

01/08/2018

Fundraising Consulting Firm  
Address  
City, State Zip Code

Re: Request for Proposal

Dear Bidder,

Care Resource is seeking proposals from qualified fundraising/development firms, referred to as the "Contractor", to assist in its fundraising efforts. The fundraising/development consultant will be responsible for planning, implementing and completing a \$2,250,000 fundraising effort. This fundraising effort includes a capital campaign to help fund the expansion of Care Resource's Midtown Health Center and Administrative Headquarters. This document is a Request for Proposal (RFP) for the services described below and does not obligate Care Resource to accept responses from eligible Contractors. The RFP establishes minimum requirements a bidder must meet in order to be eligible for consideration as well as information to be included in the Contractor's bid response.

Carefully examine the specifications, conditions and limitations.

The selection of the successful Contractor will be made based on Care Resource's evaluation and determination of the relative ability of each Bidder to deliver quality service in a cost effective manner.

The following specific criteria will be evaluated and must be addressed in the proposal:

- Company History and Organization
- Professional Experience
- Team Qualifications
- Management Approach
- Insurance Coverage
- Applicable Licenses
- Cost Proposal and Invoicing
- Transition Plan
- References

Care Resource is not obligated to accept the lowest bid and reserves the right to reject any and all bids or amend the scope of the project. All of the Bidders must be duly licensed or otherwise have the ability to perform work in accordance with all governing local authorities to the satisfaction of those authorities.

### **Background of Care Resource**

Care Resource is a Florida nonprofit public benefit corporation recognized by the Internal Revenue Service as a charitable, tax-exempt organization pursuant to section 501(c)(3) of the Internal Revenue Code. Care Resource was founded in 1998 with a defined mission to support the health of our diverse South Florida communities. Our main programs are Medical, Dental, Behavioral Health, Pharmacy, and Social Services. Care Resource is enhancing their 3510 Biscayne Boulevard location to better serve the Miami Dade community. As such, we are making significant improvements to the building to accommodate state-of-the-art facilities that will allow the health center additional capacity to fulfill the growing needs of the community and expand all of our services including additional spacious exam rooms (adult and pediatric) and lab areas, additional offices for case management and behavioral health services, additional administrative office space, and upper level parking.

### **Submission of Proposals**

Responses to this RFP are due by 5 PM on February 15<sup>th</sup>, 2018. Late submittals will be rejected. All proposals are to be sealed and addressed to the Procurement Analyst of the RFP process:

Deborah Hernandez

Care Resource

3510 Biscayne Blvd

Miami, FL 33137

Tel. 305-576-1234

Fax 305-571-2020

[dhernandez@careresource.org](mailto:dhernandez@careresource.org)

Two copies of the proposal may be mailed, faxed or delivered to the information above. Any questions regarding this RFP should also be addressed to the above individual. Contractors may not contact other executives, managers or employees of Care Resource without permission of the Procurement Analyst, Controller or the manager of the RFP process.

### **Contract Term**

The term of this contract shall be for an eighteen (18) month period unless terminated by either party with thirty (30) days written notice. The first three (3) months of the contract are to be considered a trial period during which the contract may be terminated by Care Resource at any time if services are deemed to be not satisfactory. If the services provided are satisfactory, as determined by Care Resource, the Contract term will then continue through the expiration of the eighteen-month period unless otherwise terminated by Care Resource with or without cause. In the event services are scheduled to end due to the expiration of this Contract, Care Resource may request the Contractor continue to provide services for a set period of time agreed to by both parties.

### **Scope of Services**

Care Resource is seeking a fundraising consultant to work directly with Care Resource's Marketing and Development Department, members of the Care Resource Board of Directors, and

identified Care Resource Directors and staff, to develop and implement a focused plan for 2018 fundraising that is achievable and incorporates board, corporate, and individual donor funding goals and strategies. The Contractor will carry out a fundraising plan targeting our existing prospects for funding, as well as solicit individuals, corporations, foundations and others to support this initiative, which is reflective and in alignment with the organization's mission/vision and values.

This includes but is not limited to the following tasks:

- Assess Care Resource's current fundraising program, board and staff expectations, current capacity and environmental context for fundraising. Identify strengths and weaknesses of existing fundraising efforts and infrastructure to determine areas for improvement and development.
- Implement fundraising plan to raise \$1.5 million to support the expansion of our Midtown Health Center and Administrative Headquarters, \$250,000 to support the expansion of our Pediatric Services Department and \$500,000 to support the expansion of our Behavioral Health Services Department.
- Establish solicitation priorities; propose a major gift program; establish and manage prospect lists; and research, develop and execute targeted cultivation plans and solicitation strategies for a range of prospects;
- Assist with the writing and development of print and electronic collateral materials and coordinate their design and production
- Assist with all related communications including the creation of content and talking points for media, board members, and donors; integrating fundraising milestones into ongoing public relations outreach; and assist with the management of cultivation and outreach events
- Evaluate progress toward goals, prepare monthly reports; recommend revisions to the fundraising plan, as needed to meet goals
- Assist in donor acknowledgement, stewardship and public recognition

### **Eligibility to Submit**

To be eligible to respond to this RFP, the Bidder must demonstrate the Contractor has sufficient capabilities, resources and experience to provide the services under this solicitation. Any Bidder that fails to meet all the following minimum qualification requirements may be noted as "NON-RESPONSIVE". Those qualifications are as follows:

- The Bidder shall be licensed to do business in the State of Florida. Bidder must submit a copy of Florida Division of Corporations Sunbiz report with your company registered as active.
- The Bidder must also comply with the Solicitation of Contributions Act, which requires anyone who solicits donations in the state of Florida to register with the Florida Department of Agriculture and Consumer Services (FDACS) and renew annually. Bidder must submit a copy of company's active registration.

## **Proposal Content**

In order to simplify the evaluation process and obtain maximum comparability, Care Resource requires that all responses to the RFP be organized in the manner and format described below:

- **Executive Summary**  
Describe your understanding of the work to be performed and your ability to perform the work within the time frame provided.
- **Professional Experience**  
Describe how and why your company is different from others being considered. This should include an explanation of the company's philosophy, size, structure, and qualifications with serving organizations with a similar size and operations. Briefly describe three recent projects executed by the company to demonstrate experience relevant to the proposal.
- **Team Qualifications**  
Identify the specific staff who will be assigned to this engagement if you are successful in your bid. Provide their bios specifying relevant experience to the type of services requested. Also discuss commitments you make to staff continuity, including your staff turnover experience in the last three years.
- **Management Approach**  
Describe how your company will approach the proposed services, including the use of affiliates or staff from other locations, areas that will receive primary emphasis and the type of assistance that will be required from Care Resource. Also discuss your use of technology.
- **Insurance Coverage**  
The successful bidder shall carry and maintain, with respect to any work or service performed at Care Resource facilities, insurance written by a responsible insurance company, to provide for the following:
  - Workers' Compensation as required by applicable statute
  - Commercial General Liability Insurance
  - Excess-umbrella Insurance
- **Applicable Licenses**  
Submit copies of all applicable licenses and permits as described under the eligibility section of this RFP.
- **Fees**  
Please provide a firm estimate of fees for the services to be provided. It has been Care Resource's practice for management to negotiate a fee for services each year prior to such services being rendered.
- **Transition Plan**  
Provide a projected transition plan for implementation if awarded the contract to include tasks and time frames. Include a list of all individuals assigned to your transition team with current contact information, telephone numbers and email addresses.
- **Client References**  
Include a list of at least three (3) relevant clients for reference.

Please note, bidders are to respond to all information requested in this RFP. Brochures and advertisements will not be accepted in lieu of these requirements. A qualified proposal must address all items listed above.

### Evaluation of Proposals

All proposals must include, and will be evaluated based on the following criteria:

Weight	Evaluation Criteria
10%	Evidence of the company's qualifications to provide services
20%	Background and experience in providing fundraising services comparable to request in the South Florida area.
20%	Statement of the company's understanding of work to be performed, and project/service approach.
30%	Proposed fee structure for all services requested.
10%	Names of supervisor/account manager and personnel who would be assigned to this project.
10%	References and contact information from at least 3 comparable clients.

Proposals must be received by February 15, 2018. Send proposals to 3510 Biscayne Blvd, Miami FL 33137. Requests for additional information, questions, and coordinating visits to our offices should be coordinated through Deborah Hernandez, Procurement Analyst at the number listed below. Please return the completed proposal to her attention at the address provided. We would also appreciate a response if you decline to submit a proposal.

### Key Contacts

Deborah Hernandez, Procurement Analyst	305-576-1234 x295 <a href="mailto:dhernandez@careresource.org">dhernandez@careresource.org</a>
Giuseppe Salamone, Controller	305-576-1234 x311 <a href="mailto:gsalamone@careresource.org">gsalamone@careresource.org</a>
Ron Ledain, Director of Health Promotions	305-576-1234 x277 <a href="mailto:rledain@careresource.org">rledain@careresource.org</a>

Sincerely,

Ron Ledain  
Director of Health Promotions