



May 9, 2018

**REQUEST FOR PROPOSAL
for
FEASIBILITY STUDY and CAPITAL CAMPAIGN CONSULTANT
for
THRIVE ALABAMA
A NONPROFIT HEALTHCARE ORGANIZATION**

Statement of Purpose

The AIDS Action Coalition of Huntsville, Inc. dba Thrive Alabama seeks to engage a fundraising consultant ("Consultant") to provide guidance, expertise, and assistance to TA for its upcoming land acquisition and facility construction campaign. TA invites qualified, experienced and successful consultants to submit proposals which will address our short and long term strategic needs to achieve the fundraising goals necessary to successfully accomplish the project. To be considered, written proposals should be submitted by May 29, 2018 to Thrive Alabama, Attention Marc Seldon, 600 St. Clair Avenue, Building 9 Suite 23, Huntsville, Alabama, 35801. All responders must submit a signed original and five copies of their proposals to the above address. An electronic copy to mseldon@thrivealabama.org is also required. Thrive Alabama expects to host a pre-proposal telephone conference to discuss the requirements. Interested parties will be notified of the pre-proposal date and time by email.

Background on Thrive Alabama and the Facility Construction Campaign

Thrive Alabama is a 501(c)(3) nonprofit organization with clinics in Huntsville, Florence, and Albertville, Alabama. Thrive Alabama has provided healthcare and support services for 30 years to people living with HIV/AIDS in North Alabama. The agency currently serves more than 4,000 people with services that include primary healthcare, sexually transmitted infection (STI) treatment, HIV prevention and education, nutritional counseling, substance abuse and mental health treatment, support groups, housing assistance, Affordable Care Act insurance registration, transportation, and more.

Thrive Alabama has applied for and is in the process of attaining designation as a Federally Qualified Health Clinic Look-Alike organization as defined by the Health Resources and Services Administration, an agency of the U.S. Department of Health and Human Services. Information and documents utilized for this application will be available subject to confidentiality and disclosure limitations.

Thrive Alabama employs 65 full-time staff with a number of contractual agreements with health care providers in our service area. Our mission is to empower our patients to create a healthy community by providing compassionate, accessible, affordable, comprehensive care.

In 1988, as the AIDS Action Coalition, Thrive Alabama began offering volunteer services such as providing dinner or assisting with rent payments to people living with HIV and AIDS. In 1992, Thrive Alabama opened the Joe Davis Clinic to provide medical services. To better represent our expanded services and the improved health of our clients we changed our name in 2015 to Thrive Alabama. In 2018, we launched ThriveMobile, a service that includes free HIV/STI testing and basic STI treatment on a 33-foot clinic on wheels throughout our 12-county service area.

Thrive Alabama's goal is to raise \$16 million through this campaign for land acquisition and facility construction. The acquired land and built or renovated facility will enable Thrive Alabama to better serve its current clientele and expand to serve the greater population in the Huntsville metropolitan area.

The consultant will work directly with the designated leadership team of Thrive Alabama. The consultant may be required to make presentations on the strategies and progress of the capital campaign to the board of directors and other stakeholders during the approval and execution stages of the campaign.

Requested Services

The selected consultant will be required to implement and expand the following list based on the program specifically designed for Thrive Alabama:

1. Meet with organization leadership to gather information about the history of the organization, the goals for the capital campaign and the giving history of organization supporters.
2. Develop a feasibility study to assess the capacity of the community to raise the targeted funds and the efforts that would be required to do so.
3. Develop and implement a detailed strategic fundraising plan (which will include specific details on required action items and metrics).
4. Develop a campaign case statement and other fundraising materials to be used in the fundraising campaign in conjunction with the Capital Campaign Committee.
5. Test planning assumptions with members of the organization and potential donors in the community.
6. Develop a marketing and promotional program and theme for the capital campaign in conjunction with the Capital Campaign Committee.
7. Develop performance metrics which can be utilized by the members of the campaign committee to evaluate the success of the campaign goals and objectives.
8. Structure the capital campaign program such that optimal numbers of workshops, seminars and training sessions are conducted to fully educate and inform members of the Thrive Alabama community about the objectives of the fundraising efforts.
9. Provide periodic updates on applicable trends and best practices in capital campaign fundraising efforts and make recommendations for project adjustment as pertinent.
10. Establish a written periodic performance evaluation process to assess the effectiveness and the impact of campaign activities and recommendations. This evaluation will detail and evaluate the consultant's recommendations, implementation steps, quantitative results and quality of service feedback.
11. Develop and implement a legacy or planned giving program for members of the community.

12. Work directly with the Capital Campaign Committee on the implementation and continuing assessment of the campaign plan.

INFORMATION REQUIREMENTS

Responding consultants should submit a cover letter providing an introduction to the firm or team specifying the areas of expertise. Included should be the legal name of the organization and any “dba’s”, address, phone and fax numbers of the organization and responsible branch offices. If replying in partnership with another firm, the lead firm should be designated with a primary point of contact. Also include the type of business formation, the state in which the business was formed and proof of the entity’s legal existence.

QUALIFICATIONS REQUIREMENTS and SUBMITTALS

Firms will be evaluated on the basis of overall experience, quality of proposed approach to the fundraising process, demonstrated ability to achieve successful outcomes in campaigns of a similar nature and the cost of the submitted proposal. Responses must contain the requested information and additional information as needed for clarification. Responders should provide one original and four hard copies and also one copy by email to mseldon@thrivealabama.org. Proposals should be concise while including the required information.

FORMAT REQUIREMENTS

- I. Cover Letter
 - Name, address and other identifying information (Also see “INFORMATION REQUIREMENTS” above)
 - Summary of the firm’s interest and the name(s) of individual(s) authorized to represent the firm.
 - A signature from the person authorized to obligate the firm
- II. Corporate Information
 - Firm history, including present ownership and key management members.
 - Location of corporate offices. Specify which office will be primary in this project.
 - List any current, pending or threatened firm-related litigation and any during the past five (5) years.
 - A disclosure statement listing all potential conflicts of interest or a statement in the negative regarding conflicts.
- III. Experience
 - Provide the following information for three (3) current or recently completed capital campaign fundraising consulting engagements and three (3) current or recently completed Feasibility Studies. Three references must be included for both areas. Include the methodology employed.
 - Project Name
 - Location
 - Scope and Description
 - Approach

- Contract Type and Amount
- Completion Date
- Detailed Description including Duration
- Participating Firm members

IV. Project Approach and Proposed Team

The approach should be delineated for two phases and the following information provided for each phase separately.

Phase 1 – Planning and Feasibility Study

- Details of services including the study process
- Description of Deliverables
- Outline of study philosophy and methodology including expected involvement of Thrive Alabama stakeholders
- Expected timeline.
- Vita of anticipated assigned personnel

Phase 2 – Counsel and Strategy

- Details of counseling and strategy services
- Description of deliverables
- Outline of methodology including expected involvement of Thrive Alabama stakeholders
- Expected timeline.
- Vita of anticipated assigned personnel

V. Cost Proposal

The cost proposal should be delineated for two phases, separately. The cost proposal should be enclosed in a separate, sealed envelope and clearly labelled as “Cost Proposal”. The electronically transmitted document should not include a cost proposal.

Phase 1 – Planning and Feasibility Study

- Provide a fixed fee cost.
- Estimate the number, if any, of onsite visits required. Expenses will be paid exclusive of the fixed fee cost.
- Include a summary of assumptions used to determine the fee
- Define the payment terms.

Phase 2 – Counsel and Strategy

- Provide an estimated fixed fee. A fee range, while not preferable, is acceptable
- Estimate the number, if any, of onsite visits required. Expenses will be paid exclusive of the estimated fixed fee
- Include a summary of assumptions used to determine the fee
- Define the payment terms.

EVALUATION CRITERIA and METHOD OF AWARD

Proposals submitted will be evaluated and scored according to the following categories, points and weight factors.

Category	Maximum Raw Points	Weight Factor
I. Organization, Resources, Personnel (See Format Requirements §§ I. and II.)	5	2
II. Demonstrated Experience (See Format Requirements § III.)	5	4
III. Project Approach & Proposed Team (See Format Requirements § IV.)	5	6
IV. Cost (See Format Requirements § V.)	2	1 (Ratio – Lowest Cost to Others)

Proposals will be scored according to the above matrix. Thrive Alabama may choose to interview firms onsite based on the score results. Selected firms will be notified accordingly. A combination of the highest scores and the interview presentation will determine the selected vendor.

Award will be made to one proposer for both phases. However, after award but prior to initiation of Phase 2, Thrive Alabama may opt to cancel the agreement regarding Phase 2 and re-evaluate and re-award Phase 2 based on the previously scored submittals and select another proposer for Phase 2. This second evaluation round will be scored with Phase 1 costs removed.

GENERAL TERMS AND CONDITIONS

1. Thrive Alabama reserves the right to reject any or all proposals, in whole or in part, at any time prior to selecting a consultant and entering into a contract, for any reason without liability.
2. All costs associated with the preparation of the bidder's proposal will be solely the responsibility of the responder.
3. Thrive Alabama reserves the right to select the most qualified and responsive proposer in its sole judgment and according to its evaluation process.
4. All submittals and related correspondence and supporting materials are the property of Thrive Alabama upon receipt. Proprietary information in the submittal(s) should be so indicated; however, a general indication that the entire contents or a major portion of the proposal is proprietary will not be honored.
5. Proposals submitted are irrevocable for sixty (60) days.
6. Proposers must not have been debarred, excluded or suspended from participation in any federal or state health care program, nor convicted of a crime for which a person can be debarred, excluded or suspended.
7. The laws of the state of Alabama govern the terms and performance of any resulting agreement.