

**Community Action of Allegan County
Capital Campaign
Request for Proposal (RFP)
Published 05-25-2022**

Overview

Allegan County Resource Development Committee (DBA Community Action of Allegan County) is seeking submissions from fundraising consultants to provide professional services for a capital campaign assessment and potential capital campaign.

Contact Person: Lisa Evans, Executive Director
Email: levans@communityactionallegan.org
Phone: 269-673-5472 ext. 232
Date of Issue: May 25, 2022
Due Date: Monday June 27, 2022 @ 3:00PM

Submit to: Lisa Evans, Executive Director
Community Action of Allegan County
323 Water St.
Allegan, MI 49010
info@communityactionallegan.org

Board of Directors: Dean Kapenga, Chairman, Nicole Richmond, Vice-Chairman, Linda Burton-Collier, Secretary, Lovedia Stap, Treasurer, Jim Pitsch, Jim Storey, Mike Vandenberg, Mimi Gabriel, Scott Owen, Sharon Martin, Stacey Lucas, Cara Dickerson, Lindsey Sichta, Carol Dennis, Dawn Lawson.

General

1. The RFP and addenda are available on the CAAC website at: communityactionallegan.org
2. Any changes to the RFP or addenda will be posted no later than June 13, 2022
3. Organizations are responsible for checking CAAC's website to ensure they have the most current RFP information.
3. All questions pertaining to the RFP must be in writing and received no later than June 10, 2022, questions via email, using the subject line: Capital Campaign Services RFP, to Lisa Evans, Executive Director at info@communityactionallegan.org.
5. CAAC is not liable for any costs incurred by any organization or agent thereof in connection with this RFP. Expenses incurred by responding organizations and its agents are the sole responsibility of the organization and may not be billed or charged to the CAAC now or in any time in the future.
4. Please submit five (5) printed copies to the CAAC address noted in the Overview, no later than Monday June 27, 2022 @ 3:00PM. See instructions regarding submission of estimated costs and fees for service in Required Information – Fee Structure.

5. All submitted proposals are binding until 60 days after submission date or final negotiations are complete.

RFP Purpose

CAAC seeks proposals from fundraising consultants interested in working with our organization to:

- (i) assess the philanthropic community's interest in supporting a capital campaign; and
- (ii) develop a capital campaign based on such assessment. The goal of the capital campaign is to address the need of expansion and construction of a new facility to respond to the growing demand for early childhood education and anti-poverty services.
- (iii) The CAAC Board, Executive Director and staff expect to collaborate actively with the selected firm in the work to ensure that the deliverables meet CAAC's expectations and the needs of the community it serves.

History of Community Action of Allegan County (CAAC)

CAAC was founded in May 1965 and moved to its current location over 30 years ago. CAAC is a member of the Michigan Community Action Association and the National Community Action Partnership (mission of NCAP). CAAC serves low-income households, children, families, individuals, and older adults in Allegan County. In August 2020, CAAC submitted a grant to the National Head Start Administration (NHSA) to support the expansion of our Early Head Start (EHS) Program. In January 2021 CAAC received notification of award for this expansion. In November 2021, the Board of Directors approved the organization's Strategic Plan for FY21-24. One goal edified in this plan is "To increase organizational support including funds, time, expertise, partnerships and endorsements to meet the increasing programmatic and service needs of low-income households in Allegan County." One of the action items to achieving this goal is to "Create an agency wide fund development plan to include a Capital Campaign to support the expansion of early education and agency anti-poverty programming." In February 2022, CAAC engaged the services of Lakewood Construction to complete a facility needs assessment based on the current and projected growth of early education and other agency services. During this facility review, it was found the capacity of CAAC's current 15,000 sq. ft facility to meet future needs, as well as the expansion of early education, and the desired future state of one client service center location requires the purchase of property for the construction of a new facility or the remodel of an existing building in Allegan.

The annual operating budget for FY20-21 was \$7,820,272 including \$769,545 in value of donated Facilities and Materials. In FY21, the operating budget came from the following sources:

General Donations and In-kind 11.12%
Corporate/Foundation/Govt Grants 4.28%
Federal/State Grants 84.19%
Other Program Income 0.41%

CAAC Mission: Community Action of Allegan County will serve, advocate and encourage individuals, families and communities to overcome the effects of poverty and encourage self-reliance.

Project Scope

CAAC seeks proposals from fundraising consultants interested in working with our organization to (i) assess the philanthropic community's interest in supporting a capital campaign; and (ii) develop a capital campaign based on such assessment. The goal of the capital campaign is to address the need of construction of a new facility to respond to the growing demand for early education services and anti-poverty programming in Allegan County.

The estimated goal of this campaign is \$500,000.

We anticipate a three-phase project:

Phase 1 – Assessment of the philanthropic community's interest

Conduct confidential interviews with CAAC leadership, directors and others
Identify and evaluate resources available to support a capital campaign
Identify challenges to a successful capital campaign
Identify potential prospects
Complete an audit to assess internal capabilities to support a campaign
Present findings to CAAC leadership and directors

Phase 2 – Audit of the philanthropic community's interest

Work with CAAC's Marketing Team to develop CAAC's case statement and story
Conduct confidential interviews with potential prospects
Determine realistic campaign goals
Present recommendations to CAAC leadership and directors

Phase 3 – Develop a campaign plan

Develop campaign plan, including specific goals for dollars raised, milestones, solicitation strategies
Develop a campaign calendar
Develop a campaign budget
Assist in the development of campaign materials
Present recommendations to CAAC leadership and directors

Proposed Schedule

CAAC would like to move quickly in the selection of campaign counsel and implementation of Phase 1. The selected firm should be prepared to begin work immediately after a contract is signed with the goal of completing work on the following preliminary schedule:

Week of July 1, 2022 Consultant Selection

September 2, 2022 Completion of Phase 1

October 14, 2022 Completion of Phase 2

December 30, 2022 Completion of Phase 3

Evaluation Process and Criteria

The RFP will be published, and notice of its release sent to a select number of firms with relevant experience. The RFP and any addenda will also be available on CAAC's website at: communityactionallegan.org. CAAC will select the firm based on its professed ability to meet the overall expectations of CAAC. The Board of Directors will be the judge of which submission offers the greatest benefit to CAAC. The following criteria will be used in the selection process:

- Responsiveness and completeness of the response provided to the RFP.
- Experience and qualifications of consultant and management team, including demonstrated knowledge of planning, management, evaluation skills, and experience.
- Technical quality and methodology of consultant's approach to organizing and managing the project: ability to document information and recommendations clearly in written format.
- Understanding the project objectives and scope; responsiveness to the goals outlined in CAAC's 2021-24 Strategic Plan, available at: communityactionallegan.org
- Ability of the consultant and management team to communicate and build consensus with board members, staff and community residents.
- Ability of the consultant and management team to communicate with various governmental units.
- Experience with public facility fundraising projects and/or nonprofit early education an anti-poverty projects.
- Past and current projects.
- References and examples of completed consulting projects.
- Satisfaction of former clients with competency of completed work.
- Overall project management and ability to accomplish a project of this nature within the proposed time schedule.

Selection Process

CAAC's Board of Directors, Executive Director and leadership team will review and evaluate the written responses to the RFP. The Board, Executive Director or COO/CFO at their discretion, may seek expert advice in reviewing the responses. Firm(s) submitting the top-ranked proposals may be invited to participate in an on-site interview at their own expense during the week of June 27, 2022. Full details regarding the interview schedule and format will be announced later in the process.

The Board, Executive Director and leadership team will evaluate, select organizations for interviews, check references, make the final decision, and enter into contract negotiations with the successful organization. If these negotiations fail, CAAC will proceed with contract negotiations with the firm scoring second, and so on. Unsuccessful respondents will be notified as soon as possible.

CAAC is under no obligation to make a selection under this RFP, and it reserves the right to make any selection it chooses. CAAC reserves the right to reject any and all submissions at its sole discretion, accept a proposal based on considerations other than cost, and waive or modify any provision of this RFP.

Submissions

Submit five (5) printed copies no later than Monday June 27, 2022 @ 3:00PM:

Lisa Evans, Executive Director
Community Action of Allegan County
323 Water St.
Allegan, MI 49010
info@communityactionallegan.org

See instructions regarding submission of estimated costs and fees for services in Required Information – Fee Structure.

Late submissions will not be accepted. Proposals will not be opened in public, and proposal information will be kept confidential until an award is made.

The response must include the below listed required information in the stated order.

Submissions should not exceed 20 single-spaced pages. This limit does not include the cover letter and resumes. The submission may be printed single-sided or double-sided as long as it does not exceed the 20 single-spaced page limit.

Required Information

The following should be included in the submission in the stated order:

Introduction

1. Cover letter with firm's name, address, email, phone and fax number.
2. Contact person's name, address, email, phone and fax number.
3. Statement of philosophy.
4. A concise statement that demonstrates the organization's understanding of the project and scope of services sought by CAAC.
5. Description of the organization's approach to the project.
6. Description of the implementation of the project, include listing of specific tasks.
7. Proposed completion date and timeline of the project.
8. Description of any additional consultants that will perform work as part of your proposal. Provide names, addresses, and relevant experience for additional consultants.

Organization History/Experience

1. Number of years in business.
2. Type of organization.
3. Type of ownership, identify owners, partners, etc.
4. Geographical areas of operation.
5. Professional affiliations.

Personnel

1. List of principals and stakeholders.
2. Description of the size and composition of your organization.
3. An organizational chart.
4. Resumes of the proposed project manager and other key personnel proposed to be assigned to this project (the "team")

Experience and References

1. Discuss your organization's experience and, in particular, the team's experience with capital campaigns for public facilities and, in particular, nonprofit early education and anti-poverty programs.
2. Identify five completed similar projects, that the identified key personnel have completed within the last five (5) years which best represent the skills of the organization and the team. For these projects provide:
 - a. Name and address of client.
 - b. Name, telephone number, and email address of the client contact person.
 - c. Summary of the project, include year completed.

Other Information

Provide other pertinent information that you feel makes you qualified for the proposed project.

Fee Structure (Note special delivery instructions)

1. Provide information on your proposed fee structure which separately lists each service and related fee based on the scope of the project discussed above, separately stating, if necessary, any charges for anticipated reimbursable costs. This structure should be expressed as a “fee not to exceed” figure which itemizes all services included in the proposed fee, as well as an itemized list of what would be considered “additional services” if requested by CAAC.

The fee structure information should be provided separately in a sealed envelope marked “Estimated Price and Terms of Service.”