

Request for Proposal

Capital Campaign Feasibility Study Services

(CORRECTED)

The YMCA of Northern Utah and Ogden City are requesting proposals from candidates for Capital Campaign Feasibility Study services. Proposals are for the purpose of investigating the various methods of fundraising, and feasibility to build a YMCA facility community center in the Ogden City, Weber County area in the state of Utah through a public-private partnership between the YMCA of Northern Utah and Ogden City.

Proposal packets are available and may be obtained from Ogden City Purchasing, 2549 Washington Blvd., Suite 510, Ogden, Utah, or by downloading from the Ogden City website at <http://ogdencity.com/264/Purchasing>.

Bidders are responsible for securing any and all addenda issued.

Responses to this Request for Proposal shall be submitted to the office of the City Purchasing Agent, 2549 Washington Boulevard, Suite 510 (2nd Floor) Ogden, Utah, **no later than 3 PM, April 26, 2019. LATE PROPOSALS WILL NOT BE ACCEPTED.**

The City reserves the right to accept or reject any proposal as it best serves its convenience and/or is found to be in the best interest of the City. The City reserves the right to issue contracts to multiple vendors.

Ogden City encourages and welcomes bids from women and minority owned businesses.

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YMCA of Northern Utah & Ogden City Partnership
Request for Proposal
Capital Campaign Feasibility Study Services

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All proposals and/or questions should be directed to:

Ogden City Purchasing
2549 Washington Boulevard, 5th Floor
Ogden, UT 84401
(801) 629-8000
Purchasing@ogdencity.com

All proposals must be received by April 26, 2019 no later than 3 PM MST. Three (3) copies of the proposal must be submitted in a sealed envelope and clearly marked in the lower left-hand corner: "Capital Campaign Feasibility Study Services Proposal." No faxed, electronic or telephone proposals will be accepted.

No reimbursements will be made for any costs incurred in preparing proposals.

It is the sole responsibility of those responding to this Request for Proposals to ensure that their submittal is made to the correct location and in compliance with the stated date and time.

OBJECTIVE AND DELIVERABLES OF STUDY:

The Consultant's Role:

The Consultant will conduct a capital campaign feasibility study to determine the amount of capital that could be raised from private sector donors, individuals and foundations in support of construction of a new YMCA Community Family Center.

With support from the YMCA of Northern Utah staff and Board of Directors, the consultant will:

- Assess fundraising capability based upon current situation and contacts.
- Develop a compelling case for future support for presentation to prospective new donors.
- Compile a list of potential local, regional, and national donors.
- Present strategies for reaching new donors.
- Provide training for board members, volunteers, and key staff for supporting the fundraising effort.
- Provide strategies in utilizing recognition to encourage donor support.

Objectives:

The feasibility study is the consultant's primary deliverable and should address the following areas:

- Testing of basic planning assumptions with potential donors. How do potential donors view the YMCA of Northern Utah, and do they see our goal of building the community family center important enough to place on their priority giving list.
- Expansion of prospect list. Develop a prospective donor list to include a balance of lead donors, major donors, private foundations and potentially direct mail public solicitations.
- Determine potential campaign support. By assessing prospective donors and evaluating solicitation capabilities of Board members, key volunteers and key staff, determine a realistic goal.
- Understanding and analysis of a public/private partnership. The YMCA is partnering with Ogden City for this project. We would like advice and consultation on the following items specific to a capital campaign in a public-private partnership:
 - Best practices for capital campaign when combined with public money.
 - Advise on strategies of what comes first – public \$ level or fundraising \$ level.
 - Communication plan to donors with public money.
 - Ownership structure of facility with combined public-private resources.
 - Provide an analysis of how this effects the campaign.
 - Timeline for capital campaign combined with public financing.
 - Research and feasibility of public financing.
- Identify other potential campaign leadership volunteers. Interview potential volunteers to determine their individual solicitation capability.
- Provide and explain Key assets the organization has that will contribute to success, deficits the organization has that will provide challenges, internal and external advantages/assets and obstacles/challenges that will impact success. And strategies on how to maximize assets and mitigate deficits. Set a realistic campaign goal.
- Determine campaign strategies. Identify strengths and weaknesses with respect to attaining campaign goal. Propose strategies for implementation.
- Develop a plan for soliciting individuals. Using information gained through confidential interviews between consultant and donor prospects, design a step-by-step strategy for engaging individuals and businesses, and securing generous priority gifts.
- Prepare a written fundraising campaign plan. Utilizing all information gathered through a variety of methods including those listed above, compile a comprehensive and detailed recommendation for meeting the campaign goal, along with estimate of cost.

Deliverables:

- Situation Analysis. Utilizing various methods, including those listed above, inventory assets, challenges and opportunities related to the campaign. Advise on strategy on how a capital campaign and public resources fit into a capital campaign.
- Case for Support. Provide documentation and precedent in the support of the proposed strategy.
- Donor Prospects and Volunteer Prospect Lists. Within the list, identify priority prospects across a full and diverse range of donor and solicitation levels.

- Campaign Plan. Outline a capital campaign plan that includes case statement, time and dollar goals, prioritized donor segments, recommended solicitation strategies and tools for training volunteers and staff, campaign pyramid anticipating segmented goals from lead donors, major donors, private sector, foundations, public financing, etc.
- Campaign Plan and Strategy for Public-Private Partnership: Advise and outline the strategy for successfully integrating a capital campaign with public resources.
- Campaign Refinement. After delivery, refine the campaign plan considering input from key staff, Board Members and solicitation volunteers.

Required Information To Be Submitted:

- Description of the firm
- General information about the principals
- General information about the primary staff person to be assigned to the project
- Description of other support staff to be assigned to the project (number & experience)
- Methodology/Procedures
- Description of quality control measures
- Timeline
- Description of project experience with not-for-profits
- Example report; what information will be provided and how will it look
- Outline of fees and fee structure and study timeline for the work to be provided. Include a specific outline of what is included in your fees along with any additional expenses we should expect to incur by working with your organization.
- Full contact information for at least five references, including a list of all YMCAs (or, non-profit community centers) you and your organization have worked with in the past.
- Conflicts of interest

SUBMITTAL REVIEW AND ASSESSMENT:

Proposals will be judged on multiple criteria, and not solely on price. The firm or firms found to be most qualified and in the best interest YMCA and Ogden City shall be selected. Criteria used in evaluating the proposals will include but may not be limited to the following:

1. Responsiveness to the RFP: 30%
2. Firm and staff qualifications: 40%
3. Proposed fees and costs: 30%

CONTRACT FORM:

The final contract will be negotiated with the successful firm(s). The scope of services may include all or part of the services stated above.

AUTHORIZATION TO BEGIN WORK:

The contractor shall be expected to begin work as soon as an acceptable agreement has been prepared, approved and signed by all parties.

GOVERNING INSTRUCTIONS:

The Request for Proposal (including all attachments) shall constitute the governing document, and shall take precedence over any oral representations. Should additional instructions become necessary, an addendum shall be issued to all who received this original request.

GENERAL TERMS AND CONDITIONS

YMCA and Ogden City reserve the right to reject any and all proposals, and to waive minor irregularities in any proposal.

YMCA and Ogden City reserve the right to request clarification of information submitted, and to request additional information from any proposer. Any proposal may be withdrawn up until the date and time set above for opening of the proposals. Any proposal not so timely withdrawn shall constitute an irrevocable offer, for a period of sixty (60) days, to provide to the city the services described in the attached specifications, or until one or more of the proposals have been approved by the City's administration, whichever occurs first.

YMCA and Ogden City welcome and encourage proposals from women and minority owned businesses.

YMCA and Ogden City reserve the right to negotiate and hold discussions with prospective service providers as necessary, however, YMCA and Ogden City may award this contract without discussion of proposals received from prospective service providers.

YMCA and Ogden City reserve the right to issue contracts to multiple service providers.

Public records: Pursuant to the Utah Government Records Access and Management Act (GRAMA), records will be considered public after the contract is awarded. If an offeror wishes to protect any records, they are required to provide a written request for business confidentiality at the time the proposal is submitted, to the Ogden City Recorder.