



## Request for Proposals

HRDC is seeking a consultant to assist in the preparation and implementation of a capital campaign. Proposals will be received until 5 pm on July 16, 2018. Please address or email (preferred) to:

HRDC  
32 South Tracy  
Bozeman, MT 59715  
Attn: Kristin Hamburg, Director of Marketing and Development  
[khamburg@hrdc9.org](mailto:khamburg@hrdc9.org)  
406-585-4877

### About HRDC

HRDC is a 501(c)3 non-profit Community Action Agency incorporated in 1975. HRDC is dedicated to building a better community through innovation and leadership. We provide programs and services in the areas of Housing, Food & Nutrition, Child & Youth Development, Senior Empowerment, Community Transportation, Home Heating–Energy–Safety, and Community Development. HRDC’s main office is located in Bozeman, Montana and provides services to three counties – Gallatin, Park and Meagher counties. HRDC has a 15 member volunteer board of directors and approximately 175 employees.

### Description of the project:

HRDC is addressing the need for additional space and services within three of our seven service areas. This campaign will address the need for additional and more functional space for our Gallatin Valley Food Bank, a key component in our Food and Nutrition Department, and our Warming Center, a seasonal homeless shelter. Due to increasing demand on existing services, our Gallatin Valley Food Bank and Warming Center facilities will no longer sustain the growth the valley is experiencing. Both functions are operating out of multiple locations, decreasing efficiency and increasing costs. Further, this development will allow our Warming Center operation to transition from a seasonal shelter to a year-round shelter operation with enhanced day services. The final component is Transformative Housing for individuals experiencing long-term homelessness. Housing First Village will provide individual homes along with intensive case management and wrap around services decreasing the strain on our Warming Center function.

The project will include two parcels of land, a 23,000 square foot Food Bank, a 27,000 Warming Center with resource hub, and the construction and placement of 50 homes of 160 square foot each. Projected start date for the initial stages of the capital campaign is scheduled to begin in October 2018. Project construction is scheduled to begin in October 2020 with occupancy in 2021.

The estimated cost for the project \$16,000,000. HRDC has at its current disposal through reserves, borrowing capacity, grants and donations, approximately \$8,000,000 leaving HRDC to consider a capital campaign with a goal of \$8,000,000.

### **HRDC needs/schedule:**

The purpose of this Request for Proposal is to retain a fundraising consultant who will 1) conduct a thorough feasibility study; 2) manage the implementation and launch of the campaign; 3) track progress and ensure the campaign remains a priority for the organization; 4) identify a donor base and explore what financial goals might be possible; and 5) provide progress reports and modifications to the campaign as needed to maximize results.

HRDC has not in its history embarked on a capital campaign of this size. Last year we raised \$ 1,585,863 million in private donations and \$347,144 in private foundations and grants. We have a donor base of approximately 7,000 donors. HRDC's operating budget is approximately \$15 million.

### **Schedule:**

June 18, 2018	RFP issued.
July 16, 2018	Proposals due by close of business
July 20, 2018	Interviewees selected and notified via phone; other firms notified of decision by letter.
August 1 -17 2018	Presentations to Selection Committee
August 23, 2018	Selection Committee Recommendation to the Board
August 27, 2018	Consulting Firm notified
September 2018	Feasibility study begins

### **Proposal format and requirements:**

Please address tasks in phase 1 and 2. You may submit additional information on your firm.

#### **Firm Capabilities:**

- Services provided by your firm relative to a feasibility study and to a capital campaign.
- What resources does your firm have available (either through other staff or affiliations with others)?
- Experience with similar projects (size, type of organization, size of community, etc.)

## **Phase 1 – Feasibility Study:**

- Describe your Feasibility Study process. Include how many interviews you will conduct and what additional fact finding procedures do you complete.
- Estimate how long it will take to complete the study.
- How do you identify who to interview?
- What information and recommendations will be included in the Feasibility Study Report?
- What are your expectations of HRDC Directors, Development Staff, CEO and Board members during the feasibility study process?
- At the conclusion of the study process, will you share with us what each interviewee said and what they indicated they might give to the campaign to the best of your ability?
- What will you charge to perform this feasibility study? Please include estimates of consultant travel and expenses as well as any limitations on your time/travel that might cause us to pay more than your original proposal.
- If selected what will your first step be?

## **Phase 2 - Plan Development and Implementation:**

- Develop a campaign plan and calendar
- Work with Directors and Board to develop budget and approval process
- Board and Staff education and training
- Assist with the creation of collateral materials created for launch of capital campaign, including media releases, social media and print ads, web site, donor packets and campaign language
- Set goals and develop fundraising strategy and timing
- Donor recognition and naming opportunities
- Assist with the planning of campaign related events
- Campaign tracking of benchmarks

## **Track Record and References:**

- Please provide a complete client list.
- Are you presently doing any work in the Bozeman Area/Gallatin County? If so, who and where?
- Please provide a sample of previous work related to carrying out a capital campaign – marketing materials, social media posts, web pages, event descriptions
- What makes your firm “right” for HRDC and this important campaign and project?
- Would you need office space?

*With security, dignity and respect at our forefront, we provide opportunities for customers to achieve independence by being community engineers. We are HRDC.*