



REQUEST FOR PROPOSAL
Capital Campaign Consultant Services

POWER
907 West Street, 2nd Floor
Pittsburgh, PA 15221
www.power-recovery.com

Overview & Purpose

POWER is seeking submissions from fundraising consultants interested in managing a Capital Campaign to raise capital funds for the renovation of a former school building and the creation of a POWER Campus.

POWER is a non-profit organization located in Pittsburgh whose mission is to help women reclaim their lives from addiction and related emotional health issues, and to improve the well-being of future generations.

This year, POWER will purchase the former Word of God Elementary school, which has been shuttered since 2012. With an executed Agreement of Sale in place, POWER will close on the purchase September 1, 2021.

Total project costs are estimated at \$10 million. POWER's Board of Directors approved a **\$10 million Capital Campaign** to raise funds to renovate the building in Swissvale into a comprehensive center, the POWER Campus, where POWER will locate its full continuum of care, providing behavioral health treatment and recovery support services in one geographic location. More information about POWER can be found at www.power-recovery.com.

The purpose for this Request for Proposal is to retain a Fundraising Capital Campaign Consultant to:

1. Work collaboratively with the Board, CEO, Director of Development, and staff.
2. Review and update the organization's feasibility/planning study.
3. Design a campaign plan, including identification and prioritization of prospects.
4. Review and refine Case Statement.
5. Produce Campaign materials such as solicitation and leadership proposals, gift and leadership request letters, logo and brochures, gift and pledge documents, training manuals.
6. Assist with development and management of Campaign Committee.
7. Train Board of Directors and Campaign Committee members.
8. Support the implementation and launch of the campaign.
9. Track and report progress toward established benchmarks and goals.

Background

POWER provides a continuum of drug and alcohol treatment and recovery support services for women with substance use and co-occurring disorders – all of which are designed to strengthen a woman's early recovery. The organization offers centralized intake, withdrawal management, and inpatient and outpatient treatment licensed by the Pennsylvania Department of Drug and Alcohol Programs (DDAP). Additionally, POWER provides recovery support services, many of which are through partnerships with other provider systems or organizations. A major focus of these services is peer recovery support referred to as mentoring. Individuals with lived experience and credentialed as Certified Recovery Specialists are hired as Mentors to provide recovery and wellness coaching.

POWER's annual operating budget is \$7.5; the agency has 75 employees, half of whom are in recovery; and POWER serves approximately 2,600 individuals a year, 75% or more are women.

Over our 30-year history, POWER has grown from a single-focused agency to an organization that provides a full range of gender-responsive and trauma-informed services for women with substance use and co-occurring disorders. To eliminate many of the barriers that interfere with access to care, POWER is creating a Campus, where we will locate our full continuum of care. Behavioral health treatment and recovery support services will be in one geographic location. The 3-story, 45,000 square foot building being renovated is located next to, and on the same grounds as, POWER's 26-bed residential treatment halfway house program; creating a true campus environment. Organizations, who will lease space in the building, will collaborate with POWER to provide other much-needed health and human services to our clients and to the community. They will include but not limited to childcare, health care, and workforce development.

To date, POWER has secured \$2.3 million in commitments toward the Capital Campaign, including a \$1.5 RACP award, and has \$2.15 in government and foundation applications pending. Solicitation of individuals has not begun.

POWER seeks to engage a fundraising consultant to lead all Capital Campaign efforts, including development of a Campaign Plan, development and management of the timeline, creation of a Capital Campaign Committee, problem identification and resolution, and assessment of major donor potential with a focus on major gift solicitation. The goal of the Consultant will be to work with the CEO, Director of Development, Board of Directors, and Capital Campaign Committee to achieve 70% of the Campaign goal (\$7 million) by December 31, 2022 and 100% (\$10 million) by June 2023.

Scope of Work

- **Review and Assess Status** – Review and update Planning Study, review progress to date, and assess POWER's status with regard to Campaign goal.
- **Design Capital Campaign Plan** – Develop Campaign Plan, including specific goals and action steps, milestones, solicitation strategies, identification and prioritization of prospects.
- **Develop Campaign Calendar** – Develop a Campaign calendar with realistic and detailed timeline.
- **Develop Campaign Budget** – Work with Development Director and CEO to develop Campaign budget.
- **Establish Capital Campaign Committee** – Work with leadership to identify potential Campaign Committee members, finalize Committee role description, and recruit and train members.
- **Identify Major Gift Potential** – Work with Development Director to review donor lists to identify existing supporters with major gift potential and select donors; identify new major donor prospects and augment POWER's major donor pool to achieve fundraising objective.
- **Solicitation** – Work with Development Manager to schedule solicitation visits, document all activity, and report details to the Development Director.
- **Produce Case Statement** – Review, refine, and update the Case Statement.
- **Produce Campaign Materials** – Produce Campaign materials such as solicitation and leadership proposals, gift and leadership request letters, logo and brochures, gift and pledge documents, training manuals.
- **Train Leadership Team** – Train the Board, Campaign Committee, leadership staff, and volunteers.
- **Track and Report** – Track and report progress toward established benchmarks and goals.

Specific Duties & Responsibilities

- Help to identify and confirm Campaign Leadership.
- Work most closely with the Development Director and Development Manager.
- Work with Campaign Leadership, the Development Director, and CEO in the formulation of detailed and individualized strategies for all solicitations for major gifts.
- Provide documentation of all solicitation activities suitable for entry into the donor's record.
- Include the CEO, Board President, a Campaign Co-Chair or member of the Campaign Committee, or Development Director in every donor visit.
- Become proficient in using the donor database, Salsa, to record, track, reference, and manage donor information related to Capital Campaign.
- Produce regular and timely progress and tracking summaries for forecast and evaluation.
- Hold all organizational information, including donor records, in strict confidence.
- Assist in developing capital campaign materials including case for support.

Proposed Schedule

Overall Timeline: July 1, 2021 – September 30, 2022

POWER plans to move quickly in the selection of campaign counsel and initiation of Campaign planning and implementation.

Provide Leadership training:

Train Board Members and Campaign Leadership to solicit Capital gifts.

Timeline:

May 28, 2021	RFP issued
June 11, 2021	Proposals due by close of business
June 15, 2021	Present to selection committee
June 24, 2021	Board reviews and approves recommended hire
June 25, 2021	Consultant informed of selection
June 30, 2021	Signed contract due
July 1, 2021	Scope of work begins

Proposal Format and Requirements

Please address the following topics, in order, in your proposal.

Firm Capabilities:

- Services provided by your firm relative to a capital campaign.
- Provide resumes for key people to be assigned.
- Itemized cost of your services.
- Describe resources firm has (either through other staff or affiliations with others).
- Experience with similar projects (size, type of organization, size of community, etc.)
- What are your expectations of staff and Board members?

- If we select you, what will your first step be?
- Please provide an outline for the next 15 months.
- Track Record and References:
- Please provide a complete client list for the past five years.
- Are you presently doing any work in the area? If so, who and where? In order to avoid conflicts-of-interest with competing campaigns, would you agree to give us the “right of approval” over any clients you might work with in our geographic area (if we retain your services)?
- What makes your firm “right” for us, and better than other firms/individuals we could select?

1. Please provide details of your experience securing government funding.

2. Responses

Proposals must be received electronically **and** in hard copy by **5:00 PM on June 11, 2021**. Proposals should not exceed 10 pages.

Electronic version should be emailed to Samantha Dye at sdye@power-recovery.com with “Capital Campaign Consultant” in the subject line.

Original plus one copy should be mailed to:

Samantha Dye, Development Director
 POWER
 907 West St, 2nd Floor
 Pittsburgh, PA 15221

Any questions may be directed to Samantha at sdye@power-recovery.com or 412.654.5408. All proposals become the property of POWER.

Evaluation Process & Criteria

The RFP will be published and notice of its release sent to a select number of firms with relevant experience. POWER will select the firm based on its professed ability to meet the overall expectations of POWER for the project. The Board of Directors will provide final approval on which submission offers the greatest benefit to POWER. 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.
- Ability of the consultant and management team to communicate with various governmental units.
- Experience with nonprofit capital campaign 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

POWER's Board of Directors, Chief Executive Officer, Development Director, and Development Manager will review and evaluate the written responses to the RFP. The Board, CEO, Development Director, and Development Manager may seek expert advice in reviewing the responses.

The Board, CEO, Development Director, and Development Manager 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, POWER will proceed with contract negotiations with the firm scoring second, and so on. Unsuccessful respondents will be notified as soon as possible.

POWER is under no obligation to make a selection under this RFP, and it reserves the right to make any selection it chooses. POWER 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. Issuance of this RFP does not commit POWER to pay any costs incurred in preparation of proposals responding to the RFP.