



REQUEST FOR PROPOSAL
Capital Campaign Consultant Services

Montana Food Bank Network
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Overview

The Montana Food Bank Network (MFBN) is seeking submissions from fundraising consultants to provide professional services for a capital campaign assessment and potential capital campaign.

Contact Person:	Gayle Carlson, CEO gcarlson@mfbn.org 406.721.3875
Date of Issue:	August 13, 2019
Due Date:	November 14, 2019, 5:00 pm MST
Submit to:	Gayle Carlson, CEO Montana Food Bank Network 5625 Expressway Missoula MT 59808 gcarlson@mfbn.org

Board of Directors: Mary Lehman, Chair; Matt Baldassin, Vice Chair; Mark Dvarishkis, Treasurer; Maia LaSalle, Secretary; and Directors Luke Jackson, Minkie Medora, Keith Haas, Jennifer Perez-Cole, Paul Miller, Tanya Dvarishkis, Scott Kesler and Randy Riley.


General

1. The RFP and addenda are available on MFBN's website at: <https://mfbn.org/jobs/>
2. Any changes to the RFP or addenda will be posted no later than 5:00 p.m. MST, November 8, 2019. Organizations are responsible for checking MFBN's website to ensure that they have the most current RFP information.
3. All questions pertaining to the RFP must be in writing and received no later than 5:00 p.m. MST, November 6, 2019. Send questions via email, using the subject line *Capital Campaign Services RFP*, to Gayle Carlson at gcarlson@mfbn.org.
4. Please submit five (5) printed copies to the MFBN address noted in the Overview (page 2), no later than 5:00 p.m. MST, November 14, 2019. See instructions regarding submission of estimated costs and fees for service in **Required Information – Fee Structure** (page 7).
5. All submitted proposals are binding until January 14, 2020, sixty (60) calendar days following the submission due date.

RFP Purpose

MFBN 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 emergency food assistance.

The MFBN Board, CEO and staff expect to collaborate actively with the selected firm in the work to ensure that the deliverables meet MFBN's expectations and the needs of the community it serves.



THE MISSION OF THE MONTANA FOOD
BANK NETWORK IS TO END HUNGER IN
MONTANA THROUGH FOOD ACQUISITION
AND DISTRIBUTION, EDUCATION AND
ADVOCACY.

MFBN

The Montana Food Bank Network was founded in 1983 and moved to its current location over 25 years ago. Montana's only member of Feeding America, the nation's food bank, MFBN serves over 280 network partners distributing in excess of 12 million pounds (2018).

In March of 2018, the Board of Directors approved the organizations Strategic Plan in which one of the goals was "To ensure adequate infrastructure, staffing and resources to meet the needs of partner agencies and food insecure Montanans." One of the action items in this goal was to conduct a facility study to determine the viability of our existing warehouse and conduct a campaign feasibility study. In the summer of 2019, MFBN's Facility Review Committee and MMW Architects completed a facility needs assessment based on the current and projected demands of network partners within Montana (designated service area).

During this facility review, it was found that the warehouse was at 98% capacity over a two year period requiring staff to reschedule deliveries and decline product due to lack of space. In addition, staff expansion plans were not met due to office space restrictions.

The annual operating budget for FY20 is \$21,126,795 including \$17,220,000 in value of donated food, with an average of 5.7 months operating expenses in reserve funds. The fiscal year runs from July 1 – June 30. In FY19, the operating budget came from the following sources:

General Donations and Major Gifts	34%
Corporate/Foundation/Govt Grants	22%
Earned Income	34%
Interest/dividend/other Income	1%

In January 2018, MFBN launched a new website and logo.

Project Scope

MFBN 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 emergency food assistance. MMW Architects presented the Board of Directors with multiple options, all of which will require significant capital investment. The estimated goal of this campaign is between \$10 million and \$12 million.

We anticipate a three-phase project:

Phase 1 – Assessment of the philanthropic community's interest

- Conduct confidential interviews with MFBN 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 MFBN leadership and directors

Phase 2 – Audit of the philanthropic community's interest

- Develop MFBN's case statement and story
- Conduct confidential interviews with potential prospects
- Determine realistic campaign goals
- Present recommendations to MFBN 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 MFBN leadership and directors

Proposed Schedule

MFBN 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:

October 29, 2019 Consultant Selection

February 1, 2020 Completion of Phase 1

June 1, 2020 Completion of Phase 2

September 1, 2020 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 MFBN's website at: <https://mfbn.org/jobs/>. MFBN will select the firm based on its professed ability to meet the overall expectations of MFBN. The Board of Directors will be the judge of which submission offers the greatest benefit to MFBN. 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 MFBN's 2017-2020 Strategic Plan, available at: <https://mfbn.org/about-us/>. 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 emergency services 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

MFBN's Board of Directors, Chief Executive Officer and Chief Development Officer will review and evaluate the written responses to the RFP. The Board, CEO and CDO, at their discretion, may seek expert advice in reviewing the responses. Firm submitting the top-ranked proposals may be invited to participate in an on-site interview at their own expense during the week of October 21-25. Full details regarding the interview schedule and format will be announced later in the process.

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

MFBN is under no obligation to make a selection under this RFP, and it reserves the right to make any selection it chooses. MFBN 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 5:00 pm MST, November 14, 2019 to:

Gayle Carlson, CEO
Montana Food Bank Network
5625 Expressway
Missoula MT 59808

See instructions regarding submission of estimated costs and fees for services in **Required Information – Fee Structure** (page 7).

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. An acknowledgement will be sent for each proposal received.

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 MFBN.
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 emergency services.
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 MFBN.

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

Anticipated Timeline

Item	Due Date
Issue RFP	September 13, 2019
Written submissions due	October 14, 2019
Interviews with Board, CEO and CDO	October 21 – 25, 2019
Selection and notification	October 29, 2019
Complete negotiations and approval of contract	November 8, 2019