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**For more information on Capital Quest please see contact information below:**



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Consultants Serving Philanthropy Nationally  
Since 1992**

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## **REQUEST FOR PROPOSAL**

**Background Information:** *XYZ organization is a <brief description of what you do> located in <city> and <state>.*

*XYZ's Board of Directors is considering a capital project that includes:*

- *<Describe project or projects that will be funded with the capital campaign. To the best of your ability, describe the benefits to be derived from it>*

The estimated cost for the project is \$X million and construction may begin as early as *<target date for commencement of construction>*. Of the total cost of \$X, *<name of organization>* has at its current disposal through reserves and/or borrowing capability, approximately \$Y, leaving *<name of the organization>* to consider a capital campaign with a goal of \$X - \$Y.

We are seeking a consultant to help us prepare for a capital campaign and explore what financial goals might be feasible within a capital campaign.

XYZ does not undertake capital campaigns lightly. The most recent campaign was conducted in *<year>*. Over \$X million was raised and over \$X million was spent to *<describe what was done with the money from the previous campaign>*. Currently, we raise about \$xxx,xxx each year toward our total operating budget of \$x,xxx,xxx

Because of potential project timing, we want to start on planning for a capital campaign as soon as possible. Our schedule is:

*<Plug in dates as needed. As a general rule, consultants can produce a personalized proposal and get it to you within about two to three weeks. Any longer really doesn't help the consultant, and you want one that will be responsive to your timetable>*

*December 12, 200W* RFP issued.

*January 1, 200X* Proposals due by close of business.

*January 16, 200X* Interviewees selected and notified by telephone; other firms notified of decision by letter.

*January 26-30* Presentations to Selection Committee

*February 2* Presenters notified of Selection Committee Decision by telephone.

*May 15* Presentation of results to Selection Committee

*May 25* Decision on capital campaign made by Board

*May 26* If approved by the Board, capital campaign begins.

### **Proposal Format and Requirements:**

Please address the following topics in order in a proposal of **seven pages or less**. You may submit additional information on your firm, but only the proposal itself will be submitted initially to the Selection Committee. Other material will be supplied at their request.

### **Firm Capabilities:**

- Services provided by your firm relative to a feasibility study and to a capital campaign.

- What other 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.)

### **XYZ's Feasibility Study:**

- Describe your feasibility study process. Include how many interviews you'll conduct and whether you do any other fact-gathering other than interviews how long will the study take to complete?
- How do you identify who to interview?
- What information and recommendations will be included in the Feasibility Study Report?
- How do you determine who will be working with us in our campaign? Do you know now who that individual(s) will be?
- What are your expectations of 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 we select you, what will your first step be?
- Do you need us to provide office space?

### **Track Record and References:**

- Please provide us with a complete client list.
- Are you presently doing any work in the <city, state> 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?

### **Staff Development**

Proposals are due no later than close of business on <date, year> to <Contact, Organization, Address, City, State> Please provide us with <number> of proposals.

For additional information, please call or email: Name, Phone Number and Email.