A. Introduction
The Public Health Institute (PHI) is a global leader in public health. PHI is dedicated to promoting health, well-being, and quality of life for people around the world through innovative solutions and collaborative partnerships. PHI is dedicated to improving health and wellness by discovering new research, strengthening key partnerships and programs, and advancing sound health policies. During its more than 50 years as an independent nonprofit, the Public Health Institute has led and managed hundreds of projects and programs ranging from small task order contracts to large, multi-site research programs with national and international significance.

PHI has recently found it necessary to diversify revenue sources and increase fundraising efforts. Following several years of rapid growth and a strategic planning session, the need to increase and diversify funding was identified as an organizational priority. Through this Request for Proposals (RFP), PHI seeks bidders to provide the services and specifications as outlined below for a Fundraising Specialist/Consultant. The Fundraising Consultant will work with board members, senior management, and Principal Investigators/Project Directors (PI/PDs) in building fundraising capacity, as well as development of a fundraising strategy to diversify sources of unrestricted funds.

B. Proposal Format
In order for PHI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

1. Contact Information – A description of the bidder and detailed contact information.
2. Price Schedule – A description of the bidder’s price schedule – daily or hourly rates.
3. Capability Statement – A detailed response to the service/specifications requested.
4. Bidder’s References – A list of references with detailed contact information (3 minimum).

C. Submission of Proposals & Closing Time
Please submit proposals to: Lisa Stauber
Email: lstauber@phi.org

Proposals are due by: Tuesday, March 6, 2018
6:00pm – Pacific Standard Time

All questions pertaining to this proposal must be made via email to Lisa Stauber at lstauber@phi.org.
D. Solicitation Guidelines

1. Agreement
PHI intends to issue a Time & Expenses (T&E) agreement to the successful bidder from this procurement process. The agreement will outline approved billing rates for each type of service provided and the terms and conditions applicable to the work performed.

2. Discretion
PHI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. PHI may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet PHI’s business needs.

3. Offers/Quotations
Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Quotes prices should remain valid for thirty (30) calendar days from proposal submission.

4. Proposal Costs
There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.

E. Proposal Timeline and Evaluation

1. Proposal Timeline
PHI intends the follow the below timeline for review and award of this solicitation:

- Submission Deadline: up to March 6, 2018
- Review of Proposals: up to March 7, 2018
- Consultant Engagement: as soon as March 8, 2018

2. Proposal Evaluation
PHI will select the bidders whose offer will provide the most favorable mix of corporate credentials and cost, thereby ensuring overall best value procurement.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI:

- Technical Capacities
- Past Performance
- Cost Reasonableness
- Cost Competitiveness
F. Required Services / Specifications

1. Detailed Scope of Work:

   a. Assess PHI’s current fundraising program, board and staff expectations, current capacity and environmental context for fundraising utilizing past documents and plans and limited interviews.
      1. Identify strengths and weaknesses of existing fundraising efforts and infrastructure to determine areas for improvement and development.
      2. Assess the opportunities and threats external to the organization as well as the agency readiness that will inform the fundraising plan to ensure its success.

   b. Develop a multi-year fund development plan and implementation strategy to build a fundraising program that generates $150,000 - $300,000 annually in unrestricted revenue and is reflective of and in alignment with PHI’s mission/vision/values and capacity to execute and sustain.
      1. Develop a comprehensive fundraising plan with strategies to increase PHI’s fundraising efforts from (i) individuals (ii) corporations and (ii) special events
      2. Recommend key components and tactics for 2018 implementation including possible donor circle

   c. Initiate the implementation stage in conjunction with the CEO for an agreed upon time following the completion of the plan.
      1. Identify 10 new, vetted, high-potential donors.
      2. Test out strategy with at least 4 high potential donors
      3. Provide training and guidance to board members and senior management staff on how to implement the fundraising plan.
      4. Recommend a potential course of action to identify resources and establish roles to meet the fundraising strategies outlined in the plan.

   d. Provide and present the fundraising plan to the senior management team and later to the board at PHI’s Oct. 1, 2018 board meeting.

2. Requirement(s):

   • The successful bidder has a proven track record for creative excellence in developing fundraising plans and developing organizations’ fundraising capacity for domestic and global health programs.

   • The successful bidder must demonstrate a proven track record for raising funds from individual and corporate donors.
• There is a strong preference for a person with familiarity with PHI and our programs as demonstrated by past (within past 5 years) consultation, employment, or other engagement with PHI.

• The successful bidder must have the ability to work independently, excellent written and verbal communications, and with strong outcomes orientation that gets results.