

# Virginia Community Healthcare Association Request for Proposal

Partnership Proposal for the Establishment of a Charitable  
Foundation



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Establishment of a Charitable Foundation  
Virginia Community Healthcare Association  
**PROPOSALS DUE BY: December 1, 2022**

## ***Company Background***

Virginia Community Healthcare Association (VCHA), established in 1980, is a non-profit membership organization that serves as the primary care association for Virginia's thirty community health centers and look-alike health centers. Membership in VCHA is open to all Federally Qualified Health Centers (FQHCs) and Federally Qualified Health Center Look-Alikes operating delivery sites in Virginia.

VCHA supports health centers in their mission to provide access to health care regardless of geographic location or ability to pay. VCHA works with health centers, community leaders, and partners to enhance access to affordable, high-quality health care and to find solutions for expanding access to care in areas that need it most.

VCHA is an integral part of Virginia's Health Safety Net which includes Virginia's Community Health Centers (CHCs), nonprofit rural health clinics, community-based providers of primary care, and health departments providing primary care services, and other similar organizations.

## ***Project Overview***

VCHA is requesting a proposal to partner with an organization that can establish a philanthropic charitable foundation to aid VCHA in its mission for the Commonwealth of Virginia to have the healthiest population in America. VCHA envisions that the development and establishment of this foundation will proceed in three phases, each with measurable goals and objectives.

**Phase 1** will consist of establishing the foundation's operational infrastructure, including assisting with drafting and executing all necessary documentation and forms with the relevant government agencies.

**Phase 2** will require the development of a fundraising strategy to be used for the first three years. The strategy will include philanthropy goals and objectives to achieve the goals. Additionally, Phase 2 will entail assembling a board of directors.

**Phase 3** will consist of assisting VCHA's CEO to hire and orient the foundation's Executive Director and implement a fundraising strategy.

To reach these goals, VCHA is now accepting bids in response to this Request for Proposal.

## ***Scope of Work***

### **PHASE 1: ESTABLISHING VCHA CHARITABLE FOUNDATION**

The bid recipient will partner with VCHA to establish a philanthropic arm of VCHA by forming a charitable foundation, create Bylaws, draft and file all necessary paperwork, and establish and implement fundraising systems and processes.

**Phase 1** will require meeting the following objectives:

- Define the foundation's objectives
- Create a mission and vision statement
- Create the foundation's spending policy
- Consult with legal and accounting teams to ensure proper compliance on the foundation's establishment and tax matters:
  - Apply for an employer identification number
  - Apply to the Internal Revenue Service (IRS) for recognition as a tax-exempt 501(c)(3) charity to receive tax-deductible contributions
  - File any additional required paperwork to obtain tax-exempt status for Virginia
  - Follow IRS private foundation guidelines
- Create policies and procedures (operational, gift acceptance, fundraising, etc.), an organization chart, board of directors governance roles, board of directors membership criteria, board of directors disclosure forms, and a board meeting framework.
- Create the foundation's Articles of Incorporation and Bylaws.

## **PHASE 2: FUNDRAISING STRATEGY DEVELOPMENT AND BOARD OF DIRECTORS RECRUITMENT**

**Phase 2** will require meeting the following objectives:

- Create a three-year fundraising strategy by doing the following:
  - Prospecting donors
  - Identify the best available fundraising systems and tools to meet foundation objectives
  - Customize a prospect to donor system
  - Develop an outreach template and methodology for the board and staff to utilize
  - Create a solicitation and donor management system
  - Develop a donor recognition process
  - Create campaign stewardship policies and procedures, i.e., investment tiers, and forms.
  - Identify and outreach to prospective individuals to be potential board members. Secure board membership.
  - Assist with planning and developing the agenda for the first board of directors meeting.

### **PHASE 3: EXECUTIVE DIRECTOR RECRUITMENT/ONBOARDING AND FUNDRAISING STRATEGY IMPLEMENTATION**

During **Phase 3**, the bid recipient will assist VCHA's CEO with recruiting and onboarding the Foundation's Executive Director (ED). Additionally, the bid recipient will work closely with the new ED to implement a fundraising strategy.

Phase 3 will require meeting the following objectives:

- Recruit and onboard ED
- Establish campaign leadership and volunteer structure
- Create campaign materials
  - Gift agreement and pledge forms
  - Planned giving documentation
- Create a feasibility study, wealth screening and prospect prioritization
- Assess donor pool to devote campaign fundraising efforts to likely donors. After completion of preparation, Phase 3 will turn to campaign execution

Portfolio and solicitation management

- Equip board and staff with tools to navigate solicitations and donors to create a sustainable giving pipeline
- Provide periodic donor meeting strategies

## ***Target Deliverable Schedule***

**Final Project Due:** The partnership with the winning bid is expected to commence in January 2023. The completion of all three phases is expected to take twelve (12) months.

If this date needs to be adjusted, please include your readjusted proposed date, as well as your reasoning for shifting the schedule. All proposed date changes will be considered.

## ***Budget Constraints***

VCHA is a non-profit association with a mission to assist in providing care to underserved communities and vulnerable populations throughout the Commonwealth of Virginia. As such, appreciation is given to those bids that make every effort to provide the most competitive bid possible.

## ***Evaluation Metrics***

VCHA will evaluate bidders and proposals based on the following criteria:

- Previous experience/past performance history.
- Samples and/or case studies from previous projects.
- Projected costs.
- Experience and technical expertise.
- Responsiveness and answers to questions in the next section.
- Three references.

## ***Questions Bidders Must Answer to Be Considered***

- i. What experience do you have specifically with fundraising in the Commonwealth of Virginia?
- ii. What is your plan to create awareness or promote VCHA's foundation project?
- iii. What other funding or programmatic partners have you worked with in the past or are currently working with?
- iv. How will you measure impact for our foundation? Is there a clear and observable method for program evaluation, including baseline statistics and benchmarks for future success?
- v. Tell us about the key personnel that will be involved in this project.
- vi. Tell us about your history in sustaining new initiatives.

## ***Submission Requirements***

Bidders must adhere to the following guidelines to be considered:

- Only bidders who can meet all metrics in the Scope of Work section should submit a proposal.
- Proposals must be sent in by **December 1, 2022**. Bidders interested in submitting a proposal should submit an electronic PDF copy, by email, to General Counsel and Chief Legal Officer, Kyle Elliott (kelliott@vcha.org) and Executive Assistant, Kathleen Smith (ksmith@vcha.org).
- Include references with your proposal.
- Proposals should not be more than 10 pages (excluding a cover page and references). Failure to comply with these guidelines will result in an automatic rejection.
- A proposed schedule must also be included and clearly expressed.

## ***Contact Information***

For questions or concerns connected to this RFP, we can be reached at:

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