



Public Support & Organizational Structure Feasibility Study

Request for Proposals

Issued:

MISSION

To improve health and well-being for all living in westernmost North Carolina.

PROJECT OVERVIEW

Nantahala Health Foundation (NHF) is seeking a qualified, independent, consulting firm for the purpose of conducting a Public Support and Organizational Structure Feasibility Study for our organization. We are looking for a partner who is experienced with planning and conducting a fundraising feasibility study to assess the aligned and yet untapped public support potential; has proven experience in nonprofit strategy development, particularly related to increasing public support for grantmaking public charities; is familiar with the local donor base in Western North Carolina and/or the unique challenges of rural public support development; and, has a thorough understanding of the distinctions between a public charity and a private foundation organizational structure, especially related to health legacy foundations. The goal in conducting this feasibility study is to assess the most effective organizational structure (public charity versus private foundation), aligning with the mission of NHF and evolving needs of the community, and to use those results to develop an organizational sustainability plan in-line with the findings of the study.

This project will be funded in part using federal grant funds through the Appalachian Regional Commission and shall therefore comply with the procurement standards under the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200).

ABOUT NHF

NHF was established in 2018 with a portion of the proceeds from the sale of a regional nonprofit hospital system to a for-profit healthcare corporation. Our mission is to improve the health and well-being of individuals living in our rural region of Western

North Carolina. We primarily focus on grantmaking to address social determinants of health and providing leadership development and capacity-building services to public and nonprofit organizations. Our service area includes six counties of Western North Carolina (Clay, Cherokee, Graham, Jackson, Macon, and Swain) and the Qualla Boundary of the Eastern Band of the Cherokee Indians. As a legacy health foundation, NHF is committed to strengthening the network of organizations working to improve wellness in our region. Our Board of Directors has emphasized the importance of ensuring that NHF's fundraising efforts do not divert resources from other nonprofits in the region.

Currently, NHF's public donations provide limited revenue, and most of our income comes from investments and private sources. NHF was incorporated as a nonprofit public charity, and we are at a pivotal point in our organizational development, as we are deciding whether to maintain our public charity status or convert to a private foundation. To sustain our public charity status, it is essential to increase public donations that satisfy the public support test applicable to public charities to supplement the revenue generated from investments and private grants that do not support public charity status. We seek a consultant to help us gauge the feasibility of increasing public donations meeting the public support test in our rural, competitive environment and develop strategies to launch successful fundraising efforts if our public charity status is maintained.

STUDY OBJECTIVES AND TIMELINE

The goal in conducting this feasibility study is to assess the most effective organizational structure (public charity vs. private foundation), aligning with the mission of NHF and evolving needs of the community, and to use those results to develop an organizational sustainability plan in-line with the findings of the study. The study will be completed using the selected consulting firm's understanding of the nuances between public charities and private foundations and its knowledge of our (or a similar) philanthropic community. The study will require research, surveys, and interviews with community stakeholders. Once the study is completed, the results will be used to develop a sustainability plan that focuses on strategies to increase public support for NHF to maintain public charity status or, in the alternative, to transition to a private foundation.

Key activities, objectives, and proposed timeline:

It is expected a consultant will be chosen and work on the project will commence on or before early October 2025.

1. Feasibility Study

- Activity: The consultant will conduct a feasibility study, gathering input from community stakeholders via surveys and discussions.
- Responsibility: The consultant will lead this study with input from the NHF executive director, staff, board, and key stakeholders.
- Timeline: 4-5 months
- Objective: Based on community needs and support, the study will determine whether there is evidence of ample public support for NHF to remain a public charity or if a transition to a private foundation is the best avenue forward.

2. Development of a Sustainability or Conversion Plan

- Activity: Based on the study findings, the consultant will create a sustainability plan, including public support development strategies if NHF remains a public charity. In the alternative, the consultant will develop an organizational conversion plan if transitioning to a private foundation.
- Responsibility: Consultant will draft the plan after input/approval of approach by the NHF executive director and board.
- Timeline: 2 months
- Objective: The plan will provide actionable steps for NHF's long-term sustainability and success, including anticipated revenues and expenses associated with the recommendations.

3. Training and Implementation Support

- Activity: The consultant will provide training for the NHF executive director, staff, board, and key volunteers to ensure they can implement the chosen strategy.
- Responsibility: The consultant will lead the training sessions.
- Timeline: 1-2 months
- Objective: The training will equip key stakeholders to execute the new strategy effectively.

These activities are essential for shaping NHF's future, enabling the foundation to continue to improve wellness in the region. The feasibility study and sustainability/conversion plan will ensure NHF can adapt to community needs, whether it remains a public charity or transitions to a private foundation. The consultant's insights will guide NHF fundraising strategy and organizational development to increase community support and engagement.

REQUIRED DELIVERABLES

1. Prior to stakeholder interviews or distribution of surveys, etc., questions will be agreed upon by both parties.
2. Feasibility Study report and presentation of study objective findings, including a list of any key donor or community volunteer prospects, their interest, and giving range as applicable, key areas of emphasis for future fundraising efforts, etc. as identified through the study process.

3. Sustainability or conversion plan as applicable.
4. Training plan and associated training materials in support of the sustainability or conversion plan.

PRICING SPECIFICATIONS

1. **Federal Funding Compliance**

This project is being funded in part through a federal grant from the **Appalachian Regional Commission (ARC)**. As such, all procurement activities and resulting contracts must comply with the applicable federal regulations, specifically the **Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200)**.

2. **Fixed Price Requirement**

All quotes submitted in response to this RFP must be based on a **firm fixed price**. The quoted price shall include all costs associated with the completion of the project, including but not limited to labor, materials, equipment, travel, overhead, and any other expenses.

3. **Maximum Contract Amount**

The total cost of the proposed services **shall not exceed \$25,000**. Any quote exceeding this amount will be considered non-responsive and will not be evaluated.

4. **Simplified Acquisition Threshold**

This solicitation is being conducted under the Simplified Acquisition Threshold as defined in 2 CFR § 200.320. Procurement under this threshold allows for streamlined procedures while still ensuring full and open competition, transparency, and compliance with applicable federal regulations.

5. **Detailed Cost Breakdown**

Vendors must provide a comprehensive cost breakdown as part of their proposal. This breakdown should clearly itemize all major cost components (e.g., labor hours and rates, materials, subcontractor costs, travel, administrative fees). This will allow the evaluation team to assess the vendor's pricing structure and identify any potential cost drivers that could risk exceeding the contract cap.

6. **Cost Reasonableness and Allowability**

All costs must be **reasonable, allocable, and allowable** under the federal cost principles outlined in 2 CFR Part 200, Subpart E. The selected vendor may be required to provide documentation to support the reasonableness of proposed costs.

7. **Price Validity**

All submitted prices must remain valid for a minimum of **90 days** from the RFP submission deadline.

8. **Evaluation Criteria – Price**

Price will be a key factor in the selection process. Vendors are strongly encouraged to submit competitive proposals that demonstrate cost efficiency while remaining within the stated budget cap. The evaluation team will assess

both the total proposed cost and the clarity and justification of the cost breakdown.

CONSULTANT QUALIFICATIONS AND SELECTION PROCESS

Desired consultant qualifications include the following:

- Expertise in conducting fundraising feasibility studies, especially in rural areas.
- Proven experience in nonprofit fundraising strategy development, particularly in increasing public support for grantmaking public charities.
- A thorough understanding of the distinctions between a public charity and a private foundation organizational structure, especially related to health legacy foundations.
- Familiarity with Western North Carolina and its unique challenges, or experience in similar rural areas with comparable populations and scopes.
- Knowledge of the social determinants of health and nonprofit leadership development.
- Strong analytical and communication skills.

Each proposal will be evaluated by a sub-committee of the Board of Directors of NHF. The sub-committee members will assess proposals based on established criteria, ensuring confidentiality and adherence to NHF's conflict-of-interest policies. Criteria to be considered include the consultant firm's alignment with our desired consultant qualifications, the firm's availability to meet the established timelines of the project, and the competitiveness of the quoted project price. The Board of Directors will make the final selection, and a contract will be carried out. The project will be monitored to ensure compliance with performance standards and proper use of funds.

CONFLICT OF INTEREST DISCLOSURE

All proposers must disclose any actual or potential conflicts of interest that may arise from their involvement in this project. NHF reserves the right to disqualify any proposal where a conflict of interest is identified.

FEDERAL COMPLIANCE REQUIREMENTS

The selected consultant must comply with all applicable federal regulations, including but not limited to the following, to the extent applicable:

- 2 CFR §200.318–327 (Procurement Standards)
- 2 CFR §200.331 (Subrecipient and Contractor Determinations)
- 2 CFR §200.334–338 (Record Retention and Access)

PROPOSAL REQUIREMENTS

Please provide the firm's name, address, website, and telephone number, and include the name, title, and email address of the individual who will serve as the firm's primary

contact, as well as the names of additional team members. Please include a brief description and history of your firm.

Proposals should include a list of 3 references for similar projects that your firm has completed.

Please explain your project approach, style, and process.

Proposals should include the proposed work schedule, timeline, and deliverables resulting from the feasibility study, noting any recommended deviations from the timeline outlined above. The contract is expected to begin in early October 2025 and should ideally be completed by the end of June 2026.

Proposals must include the estimated budget for all work related to tasks and deliverables.

Please include a summary of the experience of all relevant key staff.

All prospective contractors must comply with all applicable federal laws, regulations, executive orders, and terms and conditions of the funding award and must acknowledge within their proposal that funding is contingent upon compliance with all terms and conditions of the funding award.

Proposers must certify that they are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Suggested Proposal Format:

1. Cover Letter
2. Firm Overview and Qualifications
3. Project Approach and Methodology
4. Work Plan and Timeline
5. Budget and Cost Breakdown (with an acknowledgment of a cap not in excess of \$25,000)
6. Key Personnel and Resumes
7. References
8. Required Certifications and Acknowledgements

Please acknowledge and certify compliance with the following:

- **Conflict of Interest** – please note any actual or potential conflicts of interest that may arise from involvement in this project.
- Please provide a statement acknowledging your intent to comply with all applicable federal regulations, including but not limited to the following, to the extent applicable:
 - **2 CFR §200.318–327 (Procurement Standards)**
 - **2 CFR §200.331 (Subrecipient and Contractor Determinations)**

- **2 CFR §200.334–338 (Record Retention and Access)**
- **Debarment and suspension.** All contracts and subcontracts that equal or exceed \$25,000 must have a provision requiring compliance with debarment and suspension regulations. 2 CFR Part 200, Appendix II (H). When applicable, a contract award must not be made to parties listed on the governmentwide exclusions in the System for Award Management (SAM). A SAM exclusion contains the names of parties debarred, suspended or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority. An organizations SAM Exclusion status will be verified prior to executing a contract for services.
- **Title VI of the Civil Rights Act of 1964 (and 31 C.F.R. Part 22) (Title VI).** Pursuant to 42 U.S.C. §§ 2000d et seq., recipients and subrecipients are required to abide by the policy and procedures codified at 22 C.F.R. Part 141, which stipulates that no person in the United States shall, on the ground of race, color or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity receiving federal financial assistance.
- **Section 503 of the Rehabilitation Act of 1973.** This law prohibits federal contractors and subcontractors from discriminating in employment against individuals with disabilities and requires that employers take affirmative action to recruit, hire, promote and retain these individuals.
- **Title IX of the Education Amendments of 1972 (and 31 C.F.R. Part 28) (Title IX).** This law prohibits discrimination on the basis of sex (including discrimination on the basis of pregnancy, sexual orientation and gender identity) in any education program or activity receiving federal financial assistance.
- **Age Discrimination Act of 1975 (and 31 C.F.R. Part 23).** This law prohibits discrimination on the basis of age in programs and activities receiving federal financial assistance.

PROPOSAL EVALUATION

Proposals will be evaluated based on the following criteria:

- Relevant experience and qualifications
- Understanding of project goals and methodology
- Cost-effectiveness and value
- Familiarity with rural philanthropy and local context
- References and past performance

NHF reserves the right to reject any or all proposals, to waive informalities or irregularities, and to negotiate with any proposer deemed qualified.

NHF is an equal opportunity employer and encourages proposals from minority-owned, women-owned, and disadvantaged business enterprises.

SUBMISSION OF QUESTIONS

The Nantahala Health Foundation Executive Director shall be the sole point of contact for answering questions regarding the RFP. Answers to all written questions will be

provided to all prospective contractors, giving due regard to the proper protection of proprietary information and without reference to the source of the question.

All questions should be directed via email to: L.Bailey@NantahalaHealthFoundation.org by <insert date and time>. Answers to questions will be provided to all prospective contractors by <insert date and time>.

PROPOSAL SUBMISSION

Proposals will ONLY be accepted as an electronic copy in PDF format, sent to L.Bailey@NantahalaHealthFoundation.org, no later than 5:00pm (EST) on .

Any response, modification, or amendment received after the due date and time is considered late. No late response, modification, or amendment will be accepted.

Proposals should not exceed 10 pages. The 10-page limit applies to the main body of the proposal. Attachments such as resumes, references, and budget breakdowns may be included as appendices and are not counted toward the page limit.

An introductory letter expressing an interest in providing the services should be included. The introductory letter should be addressed to:

Lori Bailey, Executive Director
Nantahala Health Foundation
1547 Highlands Road
Franklin, NC 28734