



**Amendment 2
RFP: Capital Campaign Consultant
November 6, 2024**

HTA is amending the following sections of the Capital Campaign Consultant:

Section III. Scope of Work

HTA is seeking to contract with an experienced Capital Campaign Consultant that will work with the HTA to develop and/or implement a major gift campaign with the goal of raising \$10 million within 12-to-18 months to complete the renovation of a new regional training center.

This individual or firm must be registered with the State of California Attorney General’s Registry of Charities and Fundraisers and must submit proof of registration and annual financial reports with the proposal. If the bidder is submitting a proposal to solely develop a plan for the major gift campaign and are not registered with the State of California Attorney General’s Registry of Charities and Fundraisers, they will be required to register as a fundraising counsel as a condition of the contract if awarded.

Section VI. Proposal Evaluation Factors

Proposal Narrative <ul style="list-style-type: none"> • Experience is clearly described.
Current Registration with State of California and Annual Reports <ul style="list-style-type: none"> • Proof of current active registration with the State of California Attorney General's Registry of Charities and Fundraisers • Last 3 years of Annual reports filed with the Attorney General’s Registry of Charities and Fundraisers • If the bidder is submitting a proposal to solely develop a plan for the major gift campaign and are not registered with the State of California Attorney General’s Registry of Charities and Fundraisers, they will be required to register as a fundraising counsel as a condition of the contract if awarded.
Rates and/or Fee Schedule <ul style="list-style-type: none"> • Rates and/or fee schedule are reasonable for the services being provided.
Model or Template Service Agreement <ul style="list-style-type: none"> • Fair and reasonable terms regarding indemnification and limitation of liability.
References Submitted
Cover Page Completed and Signed

Exhibit 2 – Proposal Narrative and Fee Schedule

- 1) Describe your experience and qualifications to serve as Capital Campaign Consultant for HTA. Describe your most recent three successful campaigns **executed** for nonprofits and/or training and/or educational organizations including a summary of the project, the funding goal, if you attained the goal, and timeframe to reach the goal. **If the bidder is submitting a proposal to solely develop a plan for the major gift campaign, describe your experience in developing strategies and planning documents for major gift campaigns. Include your process for developing the strategies and planning documents and how you will train HTA staff to implement them.**

- 4) Describe your process for identifying individual and institutional supporters for a capital campaign of this size and length. **If the bidder is submitting a proposal to solely develop a plan for the major gift campaign, a response to this question is not required.**

- 5) Describe your experience planning and executing fundraising events. **If the bidder is submitting a proposal to solely develop a plan for the major gift campaign, a response to this question is not required.**

- 7) Attach the Following:
 - a. Proof of current active registration with the State of California Attorney General's Registry of Charities and Fundraisers
 - b. Last 3 years of Annual reports filed with the Attorney General's Registry of Charities and Fundraisers.

Note: **If the bidder is submitting a proposal to solely develop a plan for the major gift campaign and are not registered with the State of California Attorney General's Registry of Charities and Fundraisers, they will be required to register as a fundraising counsel as a condition of the contract if awarded.**