



## Request for Proposal (RFP)

**Scope of Services:** Dogwood Health Trust invites submission of proposals to provide Independent Monitor Services.

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**About the organization:** Dogwood Health Trust (Dogwood) is a private foundation based in Asheville, North Carolina with the sole purpose of dramatically improving the health and well-being of all people and communities of 18 counties and the Qualla Boundary in Western North Carolina. Dogwood Health Trust was created from the net proceeds of the sale of Mission Hospital System to HCA Healthcare (HCA) and focuses on innovative and equitable ways to address the many factors that contribute to overall health and wellness, with a focus on housing, education, economic opportunity, and access to care and health resources. Dogwood Health Trust works to create a Western North Carolina where every generation can live, learn, earn and thrive, with dignity and opportunity for all, no exceptions. To learn more, please visit [www.dht.org](http://www.dht.org).

**Deadline for Proposals:** Four copies of sealed proposals may be mailed to the address below. Alternately, a single PDF file may be sent via email to [rfp@dht.org](mailto:rfp@dht.org). Submissions will be received until **5:00 PM EDT; February 6, 2024** or such later time as Dogwood may announce on its website as an addendum to RFP recipients at any time prior to the submittal date. Late proposals will not be accepted.

**Questions Regarding This RFP:** Rachel Ryan is the **sole** point of contact for all issues pertaining to this RFP. To ensure an equitable opportunity exists for all proposers, no oral interpretations concerning this RFP will be made to any person. *Requests for an interpretation must be made in writing and delivered by email to [rfp@dht.org](mailto:rfp@dht.org) no later than January 23, 2024. Responses to questions will be shared with all proposers on or before January 30, 2024.*

Proposal documents may be mailed in hard copy or as a single PDF file via email to:

**Dogwood Health Trust**  
**Attn: IM RFP Submission**  
**890 Hendersonville Road**  
**Asheville, NC 28803**  
**[rfp@dht.org](mailto:rfp@dht.org)**

## **RULES GOVERNING SELECTION**

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### **Examination of the RFP**

Proposers should carefully examine the entire RFP, its appendices, and all related materials and data referenced in the RFP. Proposers should become fully aware of the nature of the services requested and the conditions likely to be encountered in performing the services.

## **Proposal Development**

All materials submitted in response to this RFP will become the property of Dogwood.

## **Proposal Submission Process**

Proposals should provide a concise delineation of capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, completeness and clarity of content.

This solicitation does not commit Dogwood to select any proposer for the requested services. All costs associated with the respondents' preparations and submission shall be the responsibility of the proposer.

## **PROPOSAL CONTENT REQUIREMENTS**

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The proposal should be organized in a logical and clear manner and should include the following:

- Title Page that notes the RFP subject, the name of the proposer (both individual and multi-person organizations are eligible) and contact information (main contact person, address, email, telephone).
- Table of Contents that clearly identifies the information in the proposal.
- Evidence of experience and expertise that aligns with the RFP Evaluation Criteria.
- A Certificate of Insurance outlining the firm's coverage limits and types of coverage.

Your proposal should address the following areas:

### **History and Experience**

Provide descriptions of your experience with monitorships or similarly structured engagements. Provide contact names and contact information of at least three (3) references.

Provide general background information for the proposer including specialized experience, capabilities, and unique qualifications in the complexities of monitorships.

### **Organization & Personnel Qualifications**

Specify the principal team leader and furnish brief (no more than one page each) resumes for the key persons proposed to provide leadership, management, and/or specialized services including any sub-professionals. Document the specific role and involvement of each person proposed, including sub-professionals. Provide a project organization chart that reflects the reporting structure of your team. Provide a summary of each team member(s) tenure and experience with monitorships. As continuity of staff is important, describe the proposers efforts to retain staff, where applicable. If using subprofessionals describe the nature and length of time working with them.

## **Project Execution**

A summary of the role and duties of the Independent Monitor is included as [Appendix A – Statement of Work \(SOW\)](#). Detail your methodology for achieving the primary duties in Dogwood’s unique geography of WNC including how you and each of the team members or sub-professionals will engage in the work.

## **Fees**

Proposers should provide an annual fixed fee for the services listed in the SOW, broken down by the four main bodies of work described in the SOW. Please identify if expenses, such as travel, are included in the fixed fee amount. If aspects of the fee can be adjusted based on Dogwood assuming certain administrative responsibilities listed in the SOW, please describe those adjustments in detail in your fee narrative. In addition, provide an hourly fee schedule for each team member and/or sub-professional who will be involved in this engagement for services that may fall outside the SOW. Clearly indicate if the fixed fee or hourly fee schedule will increase on an annual basis and if so, by how much.

## **Contract Terms**

If chosen, your engagement will start on or about April 1, 2024. The terms of the engagement are included as [Appendix B – Independent Contractor Agreement](#). Proposers may share desired amendments to the agreement in the space provided on the Appendix. The engagement will be for a three (3) year contract term.

## **Disclosures**

Describe any pending litigation that has the potential to impact Dogwood, and this proposed engagement.

## **EVALUATION AND SELECTION PROCESS**

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The timeline of the RFP selection process is outlined below:

- February 6, 2024 – RFP Submission date
- February 6-February 20, 2024 – Dogwood proposal review
- February 21-March 1, 2024 – In-person interviews of finalists
- April 1, 2024 – Anticipated engagement start date for selected proposer

Following evaluation of written proposals, Dogwood may conduct in-person interviews. Finalists will be notified at least five (5) days prior to the in-person interview. Proposer personnel for each in-person interview will be limited to no more than three persons including the principal team leader.

In-person interviews are at the discretion of Dogwood and may be pursued for any reason, but are typically intended to:

- provide more detailed information about the written proposal;
- allow Dogwood to get to know the expertise and nature of the proposer’s work better; and/or
- provide both Dogwood and the proposer the opportunity to communicate ideas verbally, rather than strictly in written form.

By submitting a proposal, proposers commit to having availability **February 21 – March 1, 2024** for in-person interviews. Preference for specific dates within this time period may be submitted with the proposal and will be considered for scheduling, where possible.

### **Proposal Acceptance**

Once the selection process is complete the parties will execute a contract. Revisions to the Independent Contractor Agreement set forth in Appendix B will not be considered during contract negotiations unless they are included in your proposal.

Selection of the proposer for independent monitor services is anticipated to be announced by **April 1, 2024** and is subject to the consent of HCA and the North Carolina Attorney General.

### **Appendices**

- A. [Statement of Work \(SOW\)](#)
- B. [Independent Contractor Agreement](#)