



March 31, 2017

Hinds Hospice, a 501c3 nonprofit providing services to hospice patients in Fresno, Madera, and Merced Counties is sending a request for proposal to companies who may be interested in providing Investment oversight and management of our investment reserves. Our current reserves are approximately \$3,000,000 and we seek to continue to grow these dollars in support of our strategic plan to grow in financial sustainability.

Enclosed you will find questions defining the information we are seeking in order to make the best decision on behalf of Hinds Hospice.

Proposals will be accepted until May 31<sup>st</sup> at which time we will review and make a decision.


Please complete as many of the questions on the enclosed REQUEST FOR PROPOSAL that apply to your firm.

Please submit proposals to Rosa Charles-Butler, Executive Assistant to the CEO. Contact information is 2490 W Shaw, Fresno, California 93711.

If you have any questions re: this proposal please reach out to Amy Tobin, CEO or Mike Kosareff, CFO at 559 320 0310.

We thank you in advance for your timely response.

Sincerely,  
Hinds Hospice



Amy R. Tobin, RN, CEO

ART/rbc

Encl:

**PATIENT & FAMILY SERVICE CENTER**  
2490 W. Shaw Avenue, Suite 101, Fresno, CA 93711 . (559) 226-5683 . (559) 226-1028 fax  
**HINDS HOSPICE HOME**  
1416 W. Twain Avenue, Fresno, CA 93711 . (559) 222-0793 . (559) 222-4782 fax  
**MERCED OUTPATIENT SERVICES**  
410 W. Main Street, Suite A, Merced, CA 95340 . (209) 383-3123 . (209) 383-5308 fax  
[www.hindsposice.org](http://www.hindsposice.org)

# **REQUEST FOR PROPOSAL**

## **Firm Background**

- Please provide legal name and address of your firm with a brief profile.
- If a separate division of the above parent will be responsible for the relationship, please provide background structure between the two.
- Please provide the name, title and contact information for person in your organization responsible for this proposal.
- How do you describe the culture of your firm? What are the advantages of this culture?
- Describe the scope of your services.

## **Not-For-Profit Experience**

- Number of years of experience in not-for-profit investment management?
- Please provide a list of your not-for-profit clients. Include three specific references similar in size and business that we may contact

## **Client Service**

- Provide a brief profile of the proposed team. Include qualifications of individuals.
- What is your client service philosophy and how often do you meet with clients?
- What type of client training and education do you provide?
- Do you provide market updates and other publications? Are these accessible online? Are these proprietary?

## **Manager Selection**

- Describe your manager selection process.

-Describe your ongoing portfolio monitoring processes. -

Describe your experience with alternative investments.

-Do you have alternative investment specialists?

-Describe your experience with socially responsible investments.

-Describe resources available to assist with potential local investment opportunities.  
Would you be comfortable with monitoring such investments?

### **Additional Information**

-Is there any additional or relevant information you believe we should be aware of as we make this decision?

Have you ever been sued by a client relating to your investment advice? If so, can you provide the details and outcomes?

Can you provide the average length of your client relationships, and whether any significant clients have left your firm within the last two years?

-Do you have experience in working with institutional clients where the decisions are made by investment committees? If so, does this create any issues we should be aware?