



Request for Proposals

Fundraising Strategy

Proposal Deadline: March 1, 2021

January, 2021

Contact:

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Alzheimer Society

DURHAM REGION

TIMELINE

January 27, 2021	Release Request for Proposals
February 19, 2021	Consultant questions due
March 1, 2021	Proposal deadline. Proposals to be submitted via email to Denyse Newton at dnewton@alzheimerdurham.com
March 22 – April 9, 2021	Interview consultants
April 23, 2021	Consultant selected & advised
June 30, 2021	Phase 1 Deliverables
September 30, 2021	Final Report inclusive of Implementation Plan Communication Plan

Proposals must be received no later than March 1, 2021 at 4:30 p.m. to Denyse Newton, CEO, at dnewton@alzheimerdurham.com. Please quote "**RFP Fundraising Strategy**" in the subject line.

BACKGROUND

The Alzheimer Society of Durham Region ("ASDR") is a not-for-profit charitable organization whose mission is to improve the quality of life for those living with Alzheimer's disease and related dementias, their care partners and families, and the community at large throughout Durham Region. ASDR has operated in the Durham community for over 40 years. In Durham Region, it is estimated that 10,000 people live with Alzheimer's disease or a related dementia with this number expected to double in the next 10 years. The current Vision, Mission & Values of ASDR can be found in the attached Appendix "A".

With a staff roster of 28, ASDR provides education, support, respite and recreation to persons living with dementia and his/her caregiver & family, as well as healthcare professionals and businesses. Our operating budget of \$2.6 million is funded through the Central East LHIN, private donations and other fundraising efforts.

For more information, please visit www.alzheimer.ca/durham .

PURPOSE

ASDR seeks to engage an experienced fundraising consultant or consulting firm to provide analysis, strategy, direction, design and implementation of a comprehensive fundraising plan that will diversify its sources of funding and build sustainability for ASDR's future.

SCOPE

ASDR will work with consultants to build a fundraising & sustainability plan which will include the following objectives:

- Conduct a practical assessment & analysis of the agency's current fundraising program, capacity & outcomes
- Identification of best practices in community fundraising which should be incorporated into a multi-year fundraising strategy
- Development of an actionable and strategic multi-year fundraising plan, which will assist in the diversification of the agency's funding base to ensure the long term sustainability of the agency's programs

CONSULTANT PROFILE & QUALIFICATIONS:

To accomplish the scope requested, the following is the preferred profile of the successful consultant/consultancy firm:

1. Deep understanding and affirmation of the Alzheimer Society's mission and values
2. Demonstrated knowledge and experience with the external fundraising environment in which ASDR operates
3. In-depth experience advising the design and implementation of comprehensive fundraising campaigns
4. Excellent project management skills, as demonstrated through successful management of personnel, schedule, and budget to complete deliverables on past consulting projects
5. Demonstrated ability to use data to assess the effectiveness of various fundraising strategies and inform fundraising strategy
6. Experience with a variety of the following types of non-profit revenue streams such as: individual gifts, on-line fundraising, events, tribute giving, sponsorships, direct mail, and institutional grants from foundations and government
7. Demonstrated understanding of organizational development, ability to evaluate existing organizational fundraising structure effectiveness, and to advise on innovative change
8. Previous experience executing fundraising campaign(s) for non-profit organizations.

PROJECT OUTLINE AND DELIVERABLES:

Phase 1: Development of a Fundraising Evaluation Report including, but not limited to:

- A review of ASDR's current Case for Support
- Analysis of current fund development areas/activities/events and their return on investment of resources
- Identification of barriers to remove to ensure future fundraising success?
- Identification of organizational areas where further work may be required to ensure sustainable growth?
- Benchmarks of fundraising efforts from similar organizations to ASDR?

Phase 2: Development of a 5-Year Fundraising/Sustainability Plan & Implementation Strategy. Using the information garnered in Phase 1:

- Using identified priorities, develop a sustainable fundraising strategy and implementation plan based on ASDR's charitable fund development goals, and available resources, including strategy recommendations in the following areas:
 - Major Gifts and Individual Giving
 - Corporate Partnerships
 - Foundation Grants
 - Events
 - Donor relations and stewardship
 - Staffing, systems and infrastructure
 - Board (or leadership volunteer) role and engagement
- Communications plan in support of charitable fundraising

Proposal Content

Proposals must include the following:

1. General Information

The consultant understands that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number, and email address for each person engaged in scope activities. Further, if a consultant group or partnership of consultants is proposed, the proposal should indicate who will serve as the "point" person for the purposes of this RFP and the engagement.

2. Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant in order to complete the requested scope of work, including:

- The specific activities to be conducted at each phase
- A timeline for the activities at each phase
- Milestones and deliverables tied to those activities
- A detailed budget for each phase, along with a proposed payment schedule tied to project milestones and/or deliverables. Overall budget should not exceed twenty-five thousand dollars (\$25,000) inclusive of all costs and taxes.

3. References

The proposal should include three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number, and email address. At least two of the three references should be from a business/customer which has retained the consultant in the development of a fundraising plan that has been fully executed by the client.

4. Previous Work Product

The proposal should include at least two examples of written works similar to the scope of

work requested within this RFP. Identifying information may be redacted if necessary.

Project Budget

The fee-for-service budget for this scope of work is twenty-five thousand dollars (\$25,000). Quotes submitted must be inclusive of all costs, including taxes, expenses and fees.

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.

Proposal Evaluation

Proposals submitted in response to this RFP will be evaluated by a committee comprised of ASDR SLT and Board members according to the following criteria:

- Cost/Benefit to ASDR
- Consultant/Firm Relevant Experience and Qualifications
- Work Plan/Scope of Work
- Compliance with Proposal Requirements
- Value-Added or Innovative

Proponents may be contacted following the submission deadline for an interview or to answer clarifying questions regarding proposal content if necessary.

Criteria for Evaluating Success of the Project

The ASDR team will deem this a successful project when they are given a clear report which outlines the strategic business/fundraising directions, areas of improvement and a recommended action plan. Previous strategic and other plan materials will be provided to the consultant as background information upon request.

Application Review Criteria

The proposals will be reviewed and evaluated based on the following criteria:

Qualifications (25 points)	<ul style="list-style-type: none"> • The consultant has the qualifications needed to successfully complete the scope of work • The consultant has prior experience working on similar projects • The Consultant has extensive working knowledge of the local and provincial charitable sector in Ontario
Scope of Proposal (25 points)	<ul style="list-style-type: none"> • The proposal demonstrates an understanding of the project objectives and desired results • The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable fundraising plan • The proposal illustrates the consultant's ability to successfully execute the proposed approach
Work Plan (30 points)	<ul style="list-style-type: none"> • The proposal adequately details project activities and milestones

	<ul style="list-style-type: none"> • or deliverables associated with each phase of the scope of work • The proposal includes a detailed timeline for each stage • The work can be completed within the project timeline
Budget (20 points)	<ul style="list-style-type: none"> • The proposal includes a detailed budget for each stage of the scope of work • Proposed costs are reasonable • Proposed schedule of payments corresponds appropriately with tasks, milestones or deliverables

Reference Checks

Information from references will be evaluated using the following criteria. The evaluation will be labeled as satisfactory or unsatisfactory.

- The reference would hire the consultant again
- The original Scope of Services was completed within the specified timeline
- Interim deadlines were met in a timely manner
- The consultant was responsive to their agency's needs
- The consultant anticipated problems, and solved them quickly and effectively
- The original Scope of Services was completed within the project budget

Consultants may be asked to participate in an interview to further gauge their fit and ability to work on this project. If needed, interviews will be scheduled to take place between March 22 – April 2, 2021.

Consultant selection will be based on the consultant's written proposal, interview(s) and the results of the reference checks.