



REQUEST FOR PROPOSAL

CAPITAL CAMPAIGN CONSULTANT

Strathcona Shelter Society (SSS) requests proposals from fundraising consultants interested in planning and managing a capital campaign project to raise funds in support of the building a new women's emergency shelter in Sherwood Park, AB. Details can be found at <https://www.asafeplace.ca/>

BACKGROUND INFORMATION

Strathcona Shelter Society works to end domestic abuse and violence in Strathcona County and area. In 1984, within two years of its founding, the Society opened A Safe Place (ASP) for women and children seeking shelter, safety and support to overcome domestic violence and sexual assault. Since then, A Safe Place has sheltered more than 25,000 women and children. The organization now faces a critical point in its evolution in that its current facilities are no longer suitable, functional or socially relevant.

The Strathcona Shelter Society Board of Directors has therefore decided to rebuild and expand the current emergency shelter. The new shelter will meet the needs of 27 families – or a total of approximately 95 people - who have left a domestic violent situation in crisis. Using a 'continuous care' model that meets both the clients' crisis and long term needs, each family will be admitted as an emergency client and provided shelter by a full apartment style unit of 1, 2 or 3 bedrooms.

The new building will consist of 27 family units over four floors; the main floor with program and administration space and 3 floors each with 9 family units. There will also be safety measures such as a central courtyard, recessed hallways in the upper floors, and secured parking for all residents, staff and visitors.

The estimated cost for the project is \$17 million. SSS has approximately \$2M at its current disposal through reserves and/or borrowing capability, leaving SSS to consider a capital campaign with a goal of \$15M.

Strathcona Shelter Society currently raises approximately \$250,000 each year toward its total operating budget of \$2.5M. This has been achieved with minimal overt effort such as fund raising events, activities or direct asks, and minimal consistency in fund development personnel.

A high level fund development feasibility study was recently completed and identified the following:

- A Safe Place has elements of an early-stage model of fundraising which can potentially be leveraged as its 'start-up status'.
- There is an impressive number of significant annual donors (\$500+) and an encouraging number of donors making several donations during the year.
- The current state of annual fundraising for operations is more likely to complement than compete with a capital campaign.
- Strengthening the inputs required for a successful capital campaign (staffing up, donor-centered practices, data hygiene, publicity etc.) will elevate the entire fundraising function.

A construction timeline is still to be developed and will be based on the realization of the CMHC funding and the anticipated success of the capital campaign. Still, the Board recognizes the need to begin a capital campaign as soon as possible.

SCOPE AND DELIVERABLES

Strathcona Shelter Society is interested in retaining a fundraising consultant to provide fundraising planning services and manage a multiyear Capital Campaign to raise money needed to finance a new women's emergency shelter in Sherwood Park, AB. SSS is seeking proposals from interested Fundraising Consultants who will complete the following deliverables:

- A multi-year fundraising plan for a campaign capital goal of \$15M by October 31, 2022
- Implementation of the developed fundraising plan, achieving the \$15M goal by December 2024

Upon review of proposals, SSS may elect to enter into an agreement for one component, both components, or none of the components.

Phase 1 - Develop a Capital Campaign Plan that includes:

- Determine realistic fundraising goals and the approach to achieve the goal
- Identify any specific fundraising goals and costs linked to ASP's programs and services (eg: crisis programs, children's programs, security system).
- Identify prospective major individual, corporate and foundation donors as well as grant and naming rights opportunities.
- Work with SSS Board, Executive Director, community leaders and staff to organize a Capital Campaign Steering Committee.
- Work with Capital Campaign Steering Committee and ASP communications personnel to identify campaign messages for each year of the Project.
- Work with ASP communications personnel to develop collateral and promotional materials and utilization of social networking opportunities.
- Support SSS Board, Executive Director, Capital Campaign Steering Committee, volunteers and staff to consistently disseminate campaign messaging.

Phase 2 – Implementation of a Multi-Year Fundraising Campaign

- Manage continuous campaign prospect qualification and identification.
- Secure "lead gifts" from individual, corporate and foundation donors as well as grant and naming rights opportunities.
- Work with ASP communications personnel in refinement of campaign materials and processes.
- Oversee prospect calls and follow-ups assisted by staff and volunteers.
- Promote donor stewardship and cultivation.
- Work with ASP staff to identify potential campaign events.
- Develop donor tracking and assist with donor recognition.
- Work with ASP communications personnel on the management of public information and a public relations plan.

SSS would like to conclude the fundraising plan by October 31, 2022, and the fundraising campaign by December 2024.

PROPOSAL FORMAT AND REQUIREMENTS:

Please address the following topics in a proposal of seven pages or less. Additional material may be requested by the selection committee. Please address the following areas in your response:

Firm Capabilities:

- Description of the firm: structure, areas of expertise, number of years in business, number of employees and other data that helps to characterize the firm.
- Description of the assigned team member's experience and credentials relative to capital campaign plan development and execution, as well as the proposed responsibilities of each team member.
- Identify the person who would be the primary contact point for the client.
- Description of Firm's experience with similar projects (size, type of organization, size of community)
- Description of your experience and success in grant writing and working with corporate foundations as part of capital campaign fundraising; be specific; provide suggestions for the SSS campaign.
- Description of your experience and success using matching gift programs; be specific.
- Description of your familiarity with the demographics of Strathcona County and area.
- Description of any vendor relationships you are proposing as part of this proposal.
- Description of your testing and support plan for campaign messaging and communications.

Firm's Approach:

- Include a detailed work plan and timeline for both phases. Provide a narrative description of how the firm proposes to execute the project.

Describe the process that will be used to both develop and execute a capital campaign plan. Identify the priorities and steps in the process. Please include how you will:

- Develop the case for support/value proposition/sponsorship package
 - Identify, qualify and approach prospects
 - Cultivate and develop prospective donor relationships
 - Prepare volunteers for fundraising activities including pursuing donations on the local, neighborhood level, through connections with corporations and foundations.
 - Manage the "hand off" of those relationships to SSS for long term relationship care
- What are your expectations of SSS development staff, volunteers, Executive Director, and Board members regarding:
 - Guidance and direction
 - Marketing support
 - Relationship management support
 - Event support

- Describe how and where you will conduct your work
- Describe type and frequency of progress reporting to SSS Board, and to Executive Director if different.
- Explain how you support clients who do not have a large infrastructure in place for high level fundraising.
- Please provide an itemized estimated price and terms for all of your services by Phase, separately listing a breakdown of the scope of services. Identify professional fees, milestones and payment structure. Please include estimates of consultant travel and expenses, as well as any limitations on your time/travel that might result in additional costs beyond those proposed.

Track Record and References:

- Please provide us with three reference clients.
- Are you presently doing any work in the area? If so, who and where? In order to avoid conflicts-of-interest with competing campaigns, would you agree to give us the “right of approval” over any clients you might work with in our geographic area (if we retain your services)?
- What makes your firm “right” for us, and better than other firms/individuals we could select?

CONSULTANT SELECTION

In evaluating the responses, SSS may or may not choose to conduct telephone, online or in person interviews.

The successful firm will be selected based on professional qualifications necessary for the satisfactory performance of the services required and demonstrated competence that includes a proven track record of performing similar work. The skill and ability of the entity performing the services is a key component of the selection criteria. Cost will be only one factor in determining the selection, and as such, the contract might not be awarded to the lowest responsible firm. Final selection of a Consultant shall be at the sole discretion of SSS Board of Directors.

RFP SCHEDULE

The RFP timeline is as follows:

- | | |
|---------------|--|
| July 12, 2022 | RFP issued. |
| July 22, 2022 | Deadline for questions to SSS. The questions must be submitted to brigitte@onwardconsulting.ca |
| July 27, 2022 | Deadline for response to questions. |
| Aug 3, 2022 | Proposals due by 5 pm MST. Submit to brigitte@onwardconsulting.ca |
| Aug 8, 2022 | Successful proponent selected and notified by telephone; other firms notified of decision by letter. |

For additional information, please call or email Brigitte Baradoy at 403.850.0585 or brigitte@onwardconsulting.ca